Quest® Workspace™
Help Desk

formerly
Help Desk Authority 9.1.3
User Manual

QUEST SOFTWARE®
Simplicity At Work®

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Introduction

Help Desk Authority keeps your support center running smoothly and efficiently by automating all aspects of issue management. Help Desk Authority offers maximum flexibility, accessibility, and scalability required for fast-paced support operations.

How To Use This Manual

This manual is intended as both a guide to using Help Desk Authority, and a reference to any issues or questions you might have regarding the application. Detailed step-by-step instructions for all tasks will be provided, along with screen shots for each step.

There are also several important notifications throughout this manual:

Notes will contain additional information related to the immediate content where the note is found. Notes are a reminder of important things to consider when performing a task or procedure in Help Desk Authority.

Alerts contain important information pertinent to the material discussed in the text. They often accompany detailed instructions vital to a task or procedure in Help Desk Authority.

We recommend that you keep a copy of this manual close by for quick reference. Help Desk Authority is a very intuitive application, and this manual will assist you in discovering the powerful, more detailed features that it has to offer.

To get you started, please review our new Quick Start Guide.

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Installation of Help Desk Authority

The Installation of Help Desk Authority now includes the Installation of the HD Server Modules. Please see the Help Desk Authority Installation Guide for instructions and system requirements.

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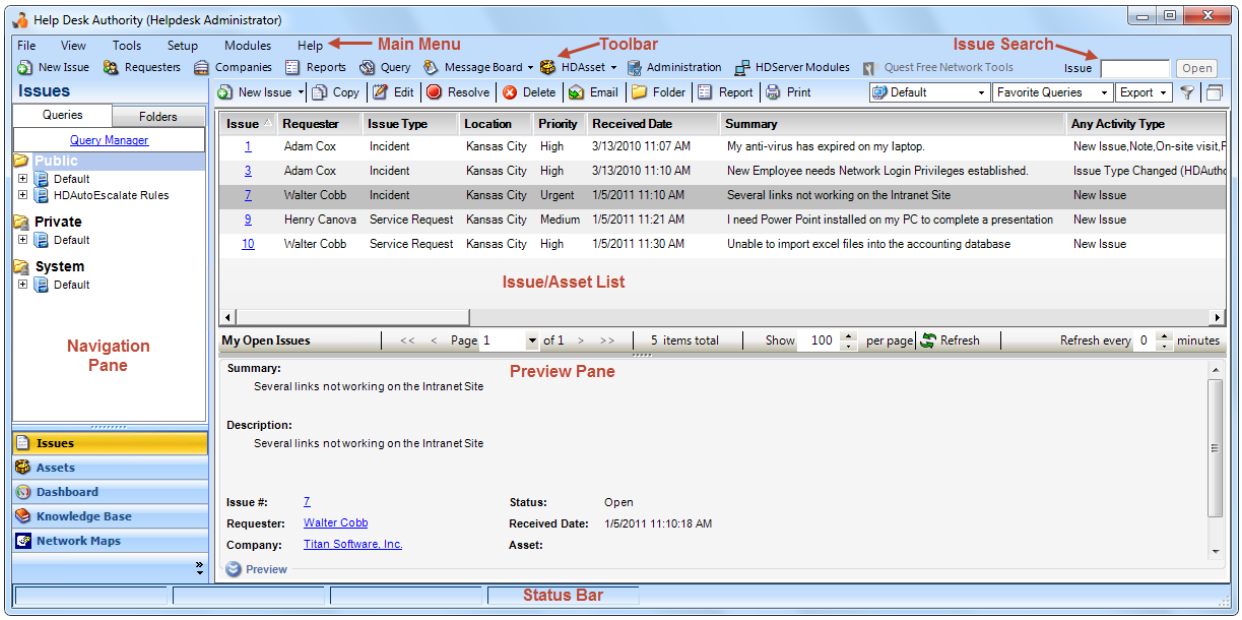
Chapter 1 – Navigating Help Desk Authority

When you initially log into Help Desk Authority, the main window is displayed. There are six regions of the window as shown below. They are:

- The Main Menu
- The Toolbar
- The Issue Search
- The Navigation Pane
- The Issue/Asset List
- The Preview Pane
- The Status Bar



Each region will be described in detail in the following sections. Note that many tasks in Help Desk Authority can be accomplished through multiple methods. Over time, you will develop methods and custom screens that are the most efficient for your particular organization.

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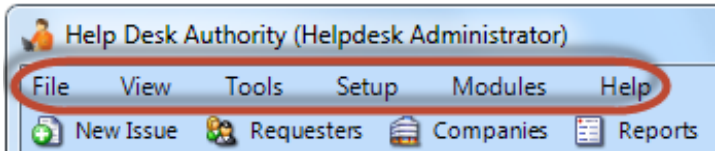
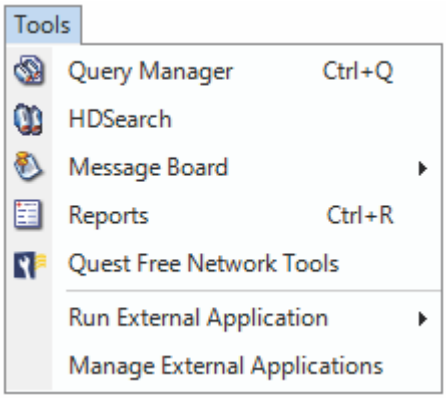
Main Menu

The Main menu displays the Help Desk Authority menus. These menus contain all of the tasks available in Help Desk Authority.



When you select a menu item, a list of commands is displayed. For example, when the Tools menu item is selected, the following list of commands is presented.

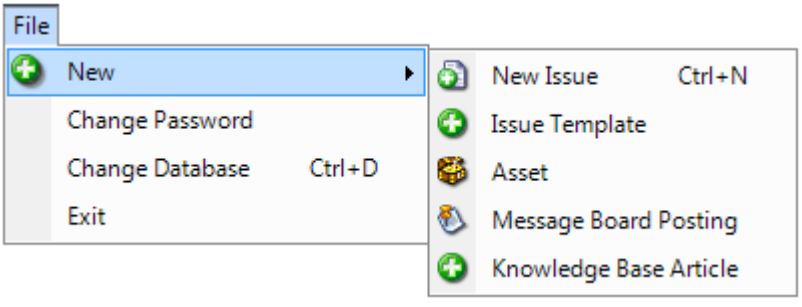


The commands displayed in a menu are presented in several different ways:

- Alone – The command is immediately executed when selected.
- Followed by an arrow (►) – Indicating a sub-menu of additional commands.
- Preceded by a checkbox – A check indicates that the option is enabled.
- Grayed-out – Indicating that the option is not currently available.

The File Menu

The File Menu and functions are shown below.



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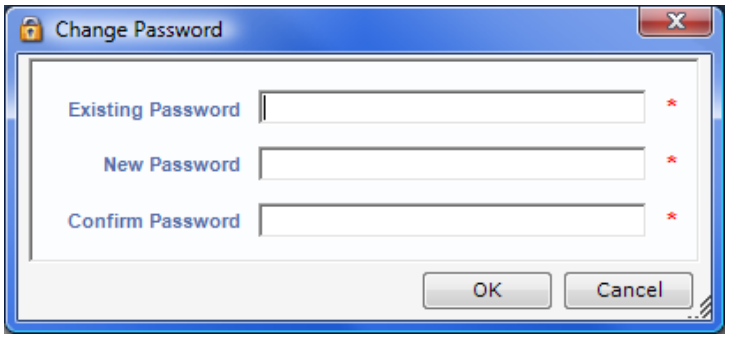
New

The **New** menu option contains a sub-menu with five separate tasks you can perform. These include New Issue, Issue Template, Asset, Message Board Posting and Knowledge Base Article. Each of these items are described in detail later in this manual.

Change Password

The **Change Password** menu option opens the Change Password dialog box shown below. Here, a user can change his password.



1. Enter the existing password in the **Existing Password** Field.
2. Enter the new password in the **New Password** field.
3. Confirm the password by re-entering it in the **Confirm Password** field.
4. Click the **OK** button when finished. Click the **Cancel** button to cancel.

Change Database

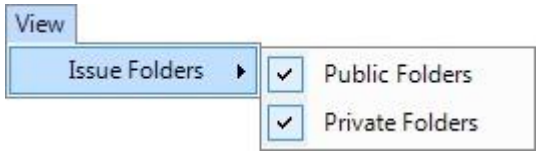
The **Change Database** menu option will allow you to log out of Help Desk Authority to log back on with a new connection profile (thus, a different database).

Exit

The **Exit** menu option will close the application.

The View Menu

The View menu enables you to select the issue folders that will be visible in Help Desk Authority.



There are two areas for selection:

- Public folders
- Private folders

From this menu, you can choose to activate or de-activate Public folders and Private folders in the Issue Folders portion of the Navigation pane. This option is located in the sub-menu under Issue Folders as shown above.

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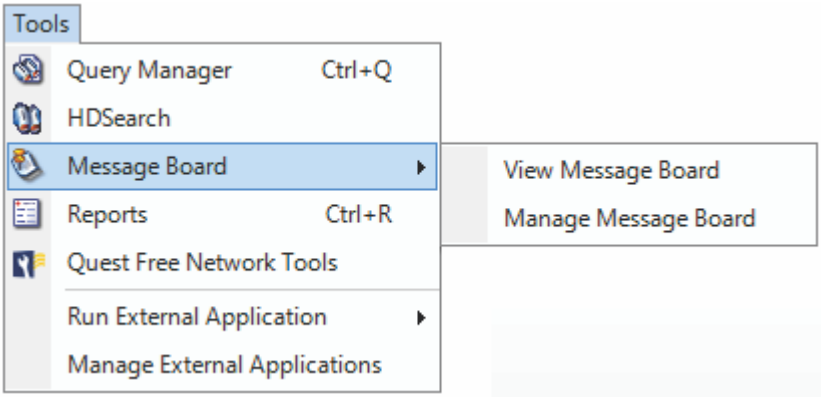
The Tools Menu

The Tools menu enables you to access key tools in Help Desk Authority. All of these items, with the exception of the last two, are explained in detail in other sections of this manual.

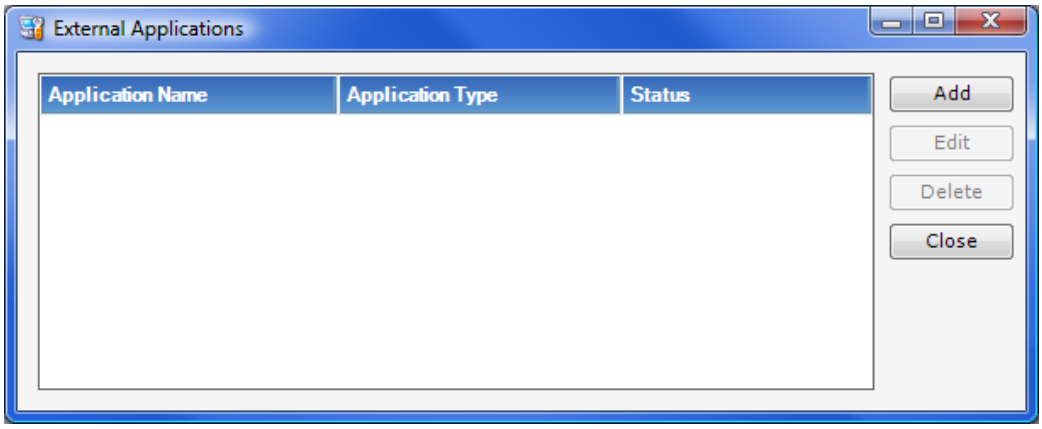


Run External Application

Help Desk Authority will allow you to run virtually any external application right from the Manu menu. If you have added applications to the External Applications list (see *Manage External Applications* below), they will be present in the sub-menu of Run External Application. If no applications have been added, the sub-menu will be empty.

Manage External Applications

This menu option opens the External Applications window shown below. From this window you can add, edit or delete external applications.



To add an application to the External Applications list:

1. Click the **Add** button. This will open the External Application window.
2. Enter a name for the external application in the **Application Name** field.
3. Select the **Application Type** by using the correct radio button (**EXE** or **URL**).
4. Enter the path to the application in the **Application String** text box.
5. Click **OK** when finished. The application will now be present in the Run External Application sub-menu as well as the External Applications window (in a list).

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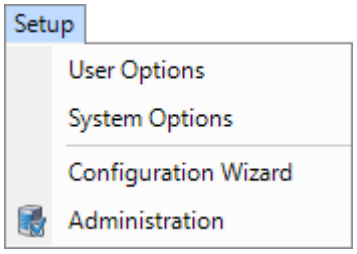
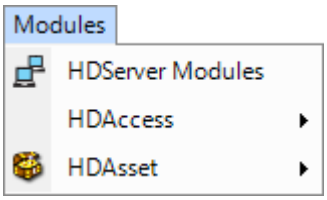
The Setup Menu

The Setup menu assists in configuring the application with quick shortcuts to User Options, the Configuration Wizard, and the Administration window. These items are explained in detail in other chapters of this manual.



The Modules Menu

The Modules menu option offers a quick shortcut to several different HDServer modules as shown below.

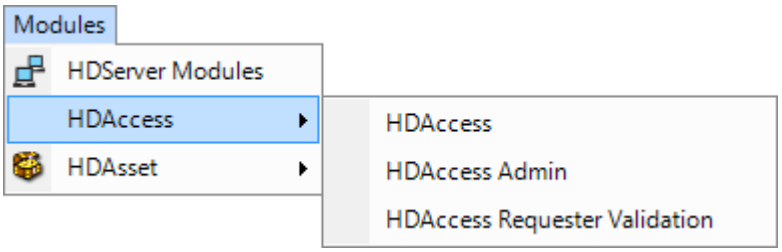


HDServer Modules

This option opens the main HDServer Modules window.

HDAccess

This option has a three-item sub-menu. The first option on the sub-menu is HDAccess. This will open HDAccess in a browser window. The second option is HDAccess Admin. This will open HDAccess for Administrators in a browser window. The third option is HDAccess Requester Validation which will be explained below.



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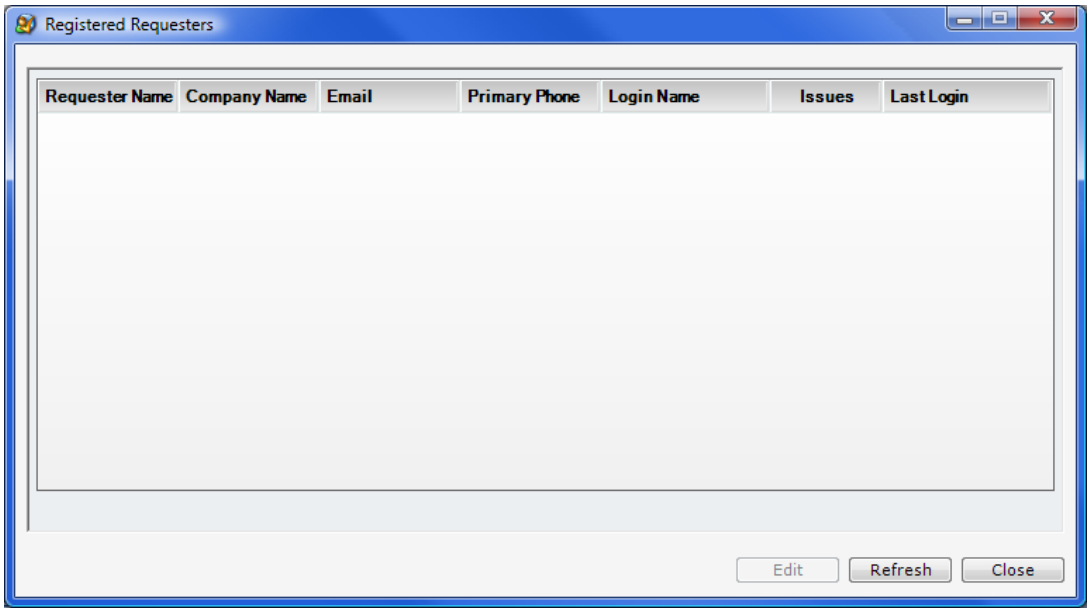
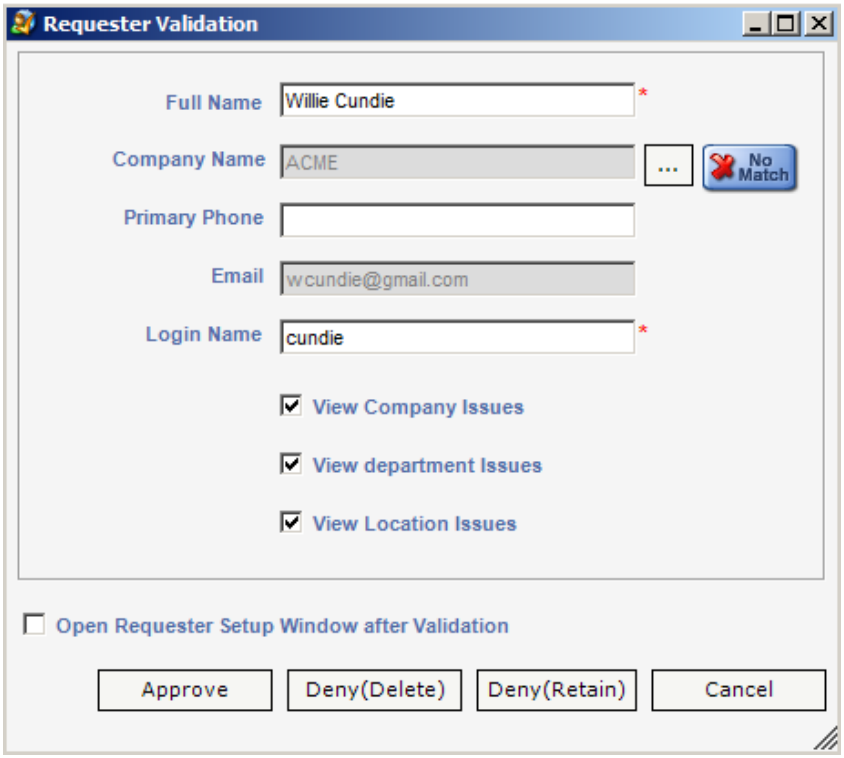
HDAccess Requester Validation

Selecting this option from the HDAccess sub-menu will open the Registered Requesters window as shown below.



Any Requester who has gone to the HDAccess website and registered as a new requester will appear in this window. Double-click on the requesters email address to open the Requester Validation window shown below.



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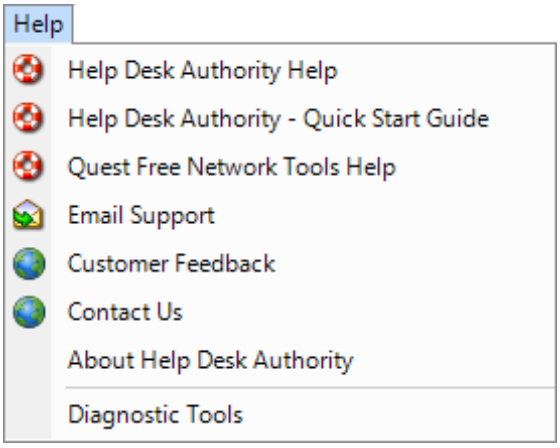
From here an administrator can approve the request by clicking the **Approve** button. The request can be denied and deleted by clicking the **Deny(Delete)** button. The request can be denied but retained for future consideration by clicking the **Deny(Retain)** button. Clicking the **Cancel** button will close the window.

HDAsset

The HDAsset menu option contains a sub-menu that includes Hardware Master, Software Master, Microsoft Hotfix and Screen Savers. All of these items are explained in the HDServer Modules manual.

The Help Menu

The Help menu provides access to the Help Desk Authority documentation and other help resources as outlined below.



Help Desk Authority Help

This menu option will open the Help Desk Authority User Manual.

Help Desk Authority – Quick Start Guide

This menu option will open the Help Desk Authority Quick Start Guide to assist new users in getting started with Help Desk Authority.

Quest Free Network Tools Help

This menu will open the Integration Guide.

Email Support

This menu option will open a new email in your email editor that is addressed to the Help Desk Authority support team.

Customer Feedback

This menu option provides a link to the Help Desk Authority customer feedback page on our website.

Contact Us

This menu option provides a link to the Contact Us page on our website.

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About Help Desk Authority

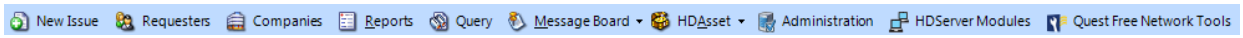
This menu option opens a pop-up window containing version and build information.

Diagnostic Tools

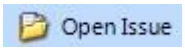
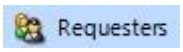
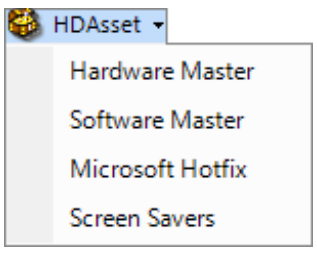
This menu option opens a window for extended error logging to troubleshoot issues with Help Desk Authority. See Chapter 12 for more information.

The Toolbar

The Toolbar contains icons that enable you to access the commands that are used most frequently by Help Desk Authority users. When you select an icon from the Toolbar, the command is executed in the same way it would be if chosen from a menu.



The icons on the Toolbar perform the following functions:

Toolbar Icon	Function
	New Issue – Opens a window for the creation of a new issue.
	**Open Issue** – Opens a window prompting you for an open issue number. If a valid, open issue number is entered, you will gain access to the open issue.
	**Requesters** – Opens the Requester window, allowing you to search for a requester, add a new requester, and modify or delete an existing requester.
	Companies – Opens the Companies window, allowing you to search for a company, add a new company, and modify or delete an existing company.
	Reports – Opens the Reports window, allowing you to perform any reporting function in Help Desk Authority.
	Query Manager – Opens the Query Manager window, allowing you to create, edit or delete issue queries and asset queries.
	View Message Board – Opens the Message Board window for viewing. **Manage Message Board** – Opens the Manage Message Board window, allowing you to create, edit, delete or sequence headlines and messages.
	**Hardware Master** – Opens the Hardware Master window, allowing you to examine all the hardware on a network. **Software Master** – Opens the Software Master Details window, allowing you to inventory the software of the network. **Microsoft Hotfix** – Opens the Microsoft Hotfix List window, allowing you to examine a record of all Microsoft hotfixes and updates on the network. **Screen Savers** – Opens the Screen Savers window,

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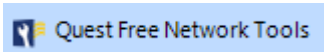
	allowing you to view the screen saver settings on all audited (asset) computers in the network.
	Administration – Opens the Administration window. From here, you can complete tasks in Requester Management, Asset Management, Issue Management, Configuration, Customization and Security.
	HDServer Modules – Opens a new window with a Navigation pane containing the Help Desk Authority Server modules including HDAutoEscalate, HDMail, HD Sync Tool and HDSearch.
	**SI360 Tools** – Opens a new window containing all of the tools included in Quest's sl360 Tools package. The network monitoring tools included are Cisco Configurator, DNS Audit, Encrypted Credential Store, Enhanced Ping, Graphical Ping, MAC Scan, Network Discovery, Network Inventory, Ping Scan, Port Scan, SNMP Scan, Switch Port Mapper, Syslog Server, TFTP Server, Trace Route, Traffic Jam, Wake on LAN, WHOIS and WMI Scan.

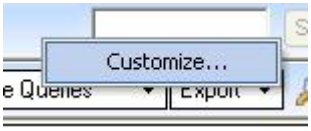
Customizing the Toolbar

A new feature in Help Desk Authority is the ability to completely customize the Toolbar. You can add items, remove items and arrange items in any way you like.

Adding an Item to the Toolbar

To add an item to the Toolbar:

1. Right click on an open area of the Toolbar and select **Customize**. This will open the Customize window.



2. Select the Commands tab.

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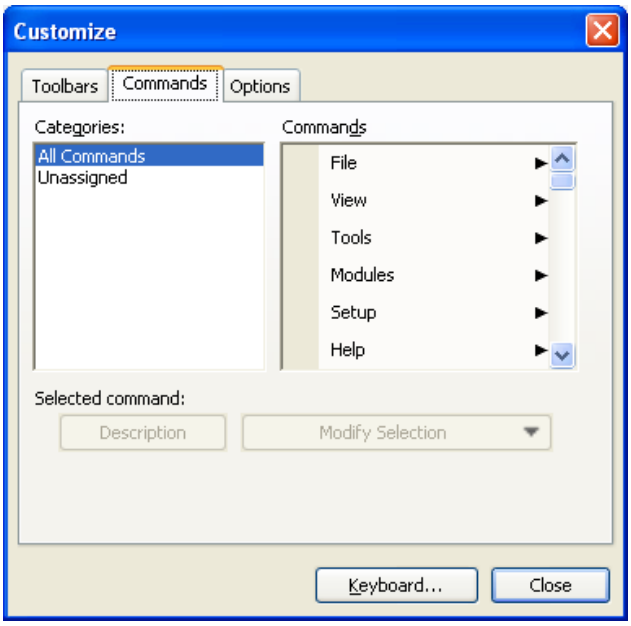

3. Under the Commands list, select an item and drag it to the Toolbar. You can add one item or several items. Note that the **Modify Selection** button will not be available.
4. When finished adding items to the Toolbar, click the **Close** button.

Moving Items Around the Toolbar

To move a toolbar item from one location to another:

1. Hold the **Alt** key and click on the item you wish to move.
2. While holding the **Alt** key, drag the item to the preferred location. You will see a vertical marker indicating the new location of the item.

Removing an item from the Toolbar

To remove an item from the Toolbar:

1. Hold the **Alt** key and click on the item you wish to remove.
2. While holding the **Alt** key, drag the item above or below the Toolbar. When you see the "**x**", release the item and it will be removed.

Resetting the Toolbar

After making changes to the Toolbar, you may find the need to simply re-set it to the default settings.

1. Right click on an open area of the Toolbar and select **Customize**. This will open the customize window.
2. Select the Toolbars tab.
3. Click the **Reset** button.
4. When prompted for confirmation, click the **OK** button.
5. Click the **Close** button to close the customize window.

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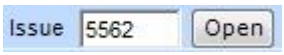
The Issue Search

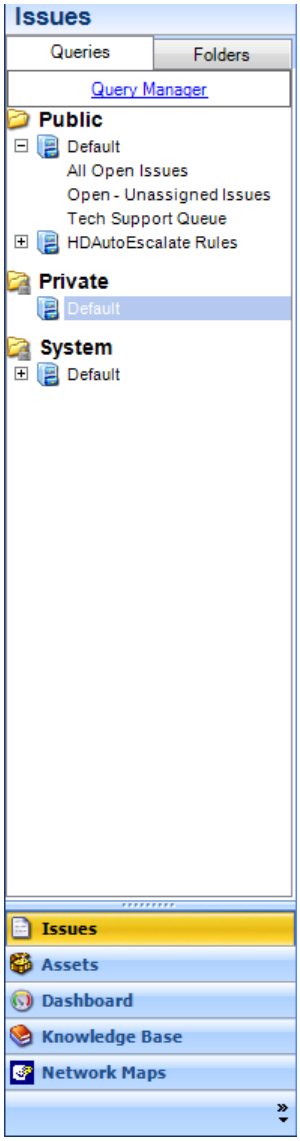
The Issue Search is located to the right of the toolbar as shown below.



Entering an issue number in the search box and clicking the **Open** button will open the issue in a separate Edit Issue window.

The Navigation Pane

Help Desk Authority's Navigation pane allows the display of menus and commands that are accessed most frequently. The Navigation pane is customized on a per-PC basis, so each PC can have individualized menus displayed. Upon installation, the Navigation pane is set up as shown in the example below:



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The bottom section of the pane shows the menus available for display. When you select one of these menus, the menu commands are displayed in the top section of the pane and will remain there until you make another menu selection. This design allows all users to have individual custom navigation capabilities for the tasks they perform most often.

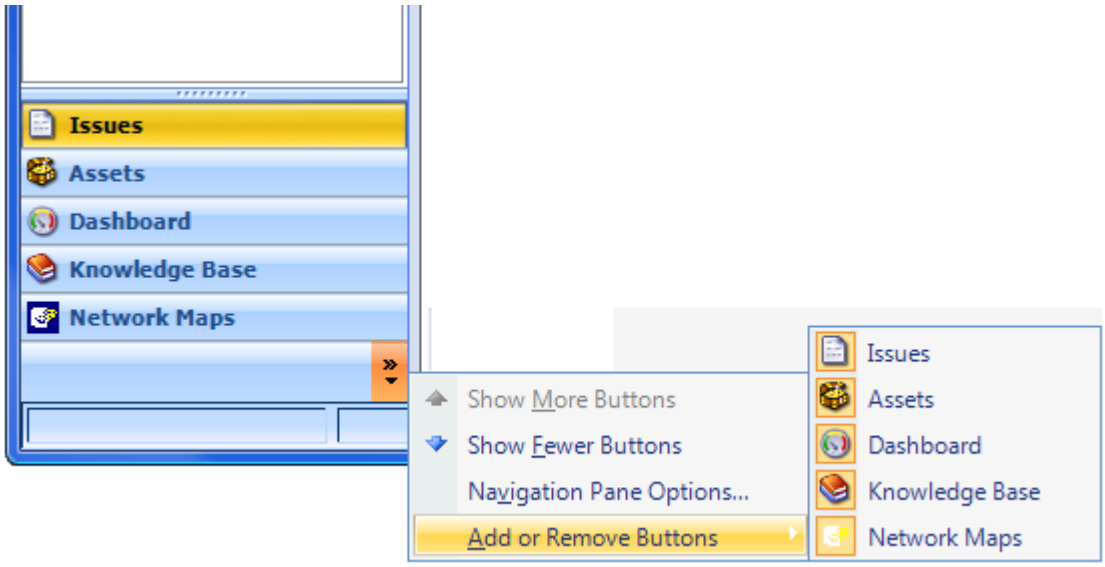
Customizing the Navigation Pane

When initially installed, the Navigation pane contains the following menus:

- Issues
- Assets
- Dashboard
- Knowledge Base
- Network Maps

To customize the Navigation pane to display a different set of menus, perform the following steps.

1. Click the down arrow in the bottom-right corner of the pane.



2. To add buttons to the bottom of the stack, select **Show More Buttons**.
3. To remove buttons from the bottom of the stack, select **Show Fewer Buttons**.
4. To select certain buttons to add, select **Add or Remove Buttons**, and then click on the buttons to be added or removed in the sub-menu.
5. To change the order of the buttons in the stack, select **Navigation Pane Options**. This will open the Navigation Pane Options window as shown below.

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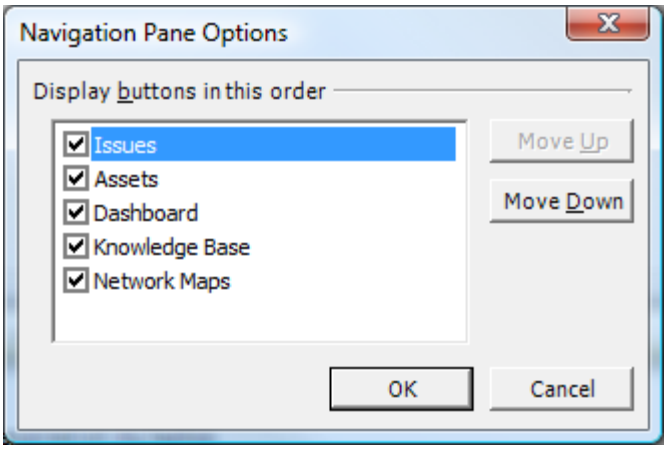

6. To organize the button stack in the Navigation pane, select a button by clicking on the name. This will highlight the button (for example, the **Assets** button above). Use the **Move Up** or **Move Down** buttons to change the location of the button in the stack. Click the **OK** button when finished.

The List Grid

The list grid is the largest section of the main window. Displayed in this section will be issue lists, Asset lists or Knowledge Base article lists, depending on the selection in the Navigation pane. The example below shows an issue list.

Issue No	Priority	Created Date	Assigned Group	Sub-Status	Company	Description
1	3 - Medium	3/13/2008 11:08...	Admin	Open - In Progr...	Titan Software,...	Expired Norton Anti-virus on Dell laptop. Will...
2	3 - Medium	3/13/2008 11:09...	Help Desk	Open - In Progr...	Titan Software,...	Office 2010 will be installed on Requester's P...
3	4 - Low	3/13/2008 11:10...	Admin	Open - Assigned	Titan Software,...	Login privileges need to be reset for the new...
4	4 - Low	3/13/2008 11:11...	Help Desk	Open - Assigned	Titan Software,...	Requester requires assistance in Microsoft Of...
5	2 - High	3/13/2008 11:18...	Help Desk	Open - New	Titan Software,...	Requester is having POP3 issues.
6	2 - High	3/13/2008 11:19...	Help Desk	Open - Assigned	Titan Software,...	Server issues have caused multiple connectio...
7	1 - Urgent	3/5/2009 11:12...	Admin	Open - Assigned	Titan Software,...	Intranet needs several broken links corrected.
8	1 - Urgent	3/5/2009 11:21...	Help Desk	Open - In Progr...	Titan Software,...	Data, wireless, and voice support so when yo...
9	2 - High	3/5/2009 11:23...	Admin	Open - New	Titan Software,...	Office 2010 installation is required.
10	2 - High	3/5/2009 11:34...	Admin	Open - In Progr...	Titan Software,...	Database appears to be corrupted.
11	2 - High	3/5/2009 11:38...	Help Desk	Open - In Progr...	ACME Products	Email encyption CRAM-MD5 was always sup...
12	3 - Medium	3/5/2009 11:59...	Help Desk	Open - New	Titan Software,...	Replacement toner needs installed by service...

Issue lists and Asset lists can be customized by using the custom list layout option located under Administration (the **Administration** button). Each list layout can be modified to fit the needs of the user.

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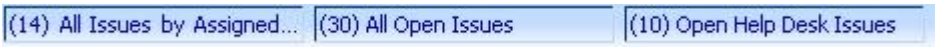
The Status Bar

At the bottom of the Help Desk Authority window is the Status Bar, as shown below. The Status Bar displays the queries that are open as selected in the Query Manager (see Chapter 6 for more information).

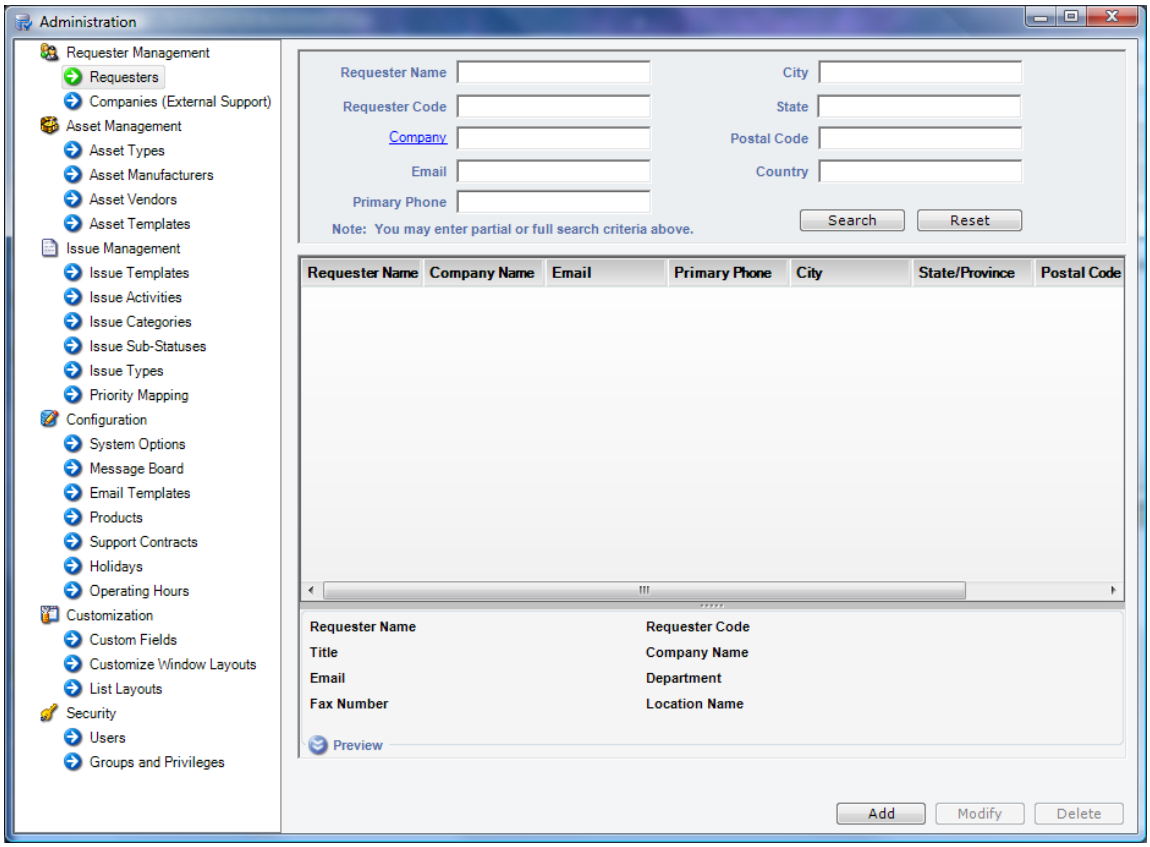


The Status Bar is described in greater detail in Chapter 4.

Data Entry

The data entry windows in Help Desk Authority are designed for simplicity and efficiency. You will have control over the amount of information collected, and very few fields are required.

Most Help Desk Authority data entry forms are accessed through the Administration window (accessed via the **Administration** icon in the Toolbar). When you select a command, a selection window is presented, as shown in the sample Requesters window below:



A significant change from Help Desk Authority version 8.3 to version 9 is the introduction of the Administration task group located in the Administration window. A detailed explanation can be found in The Administration chapter.

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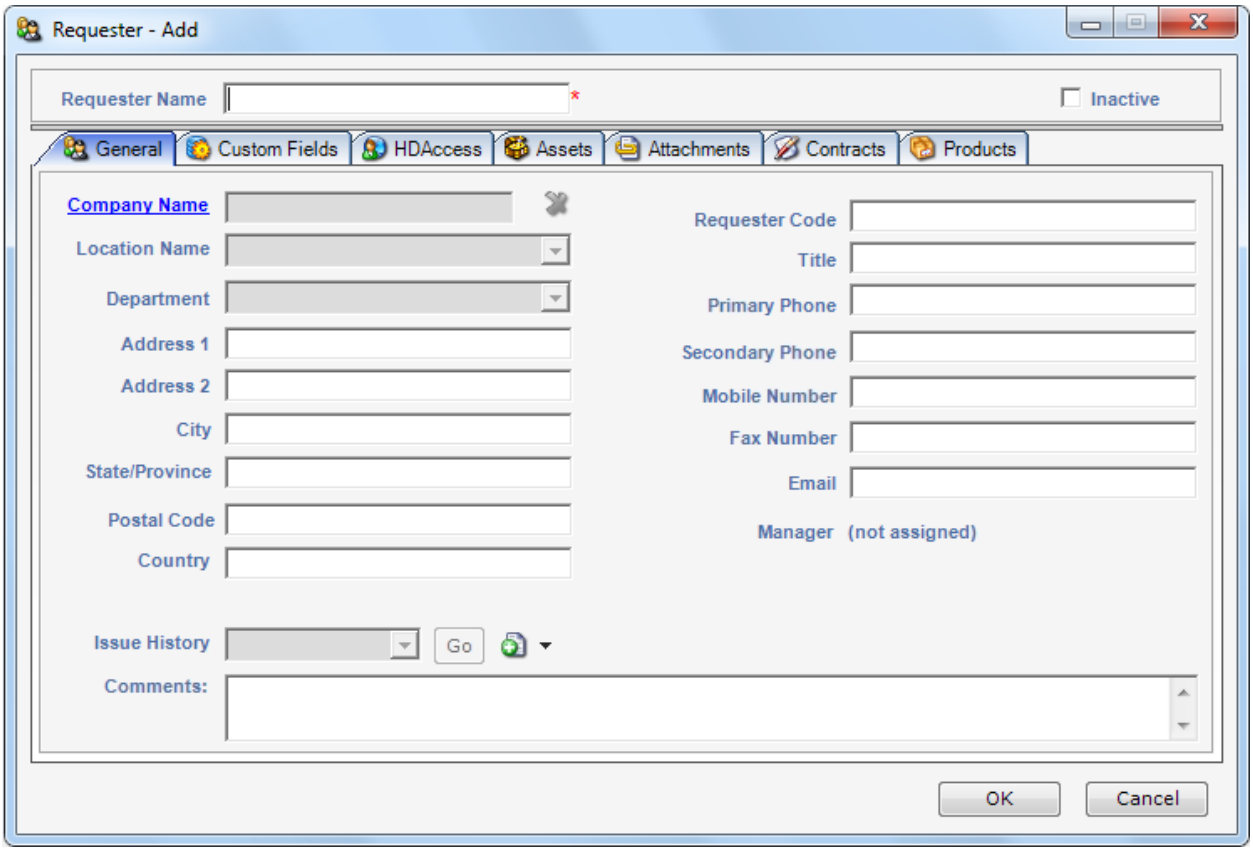
At this point, you can perform several tasks:

- Enter the selection criteria and then click the **Search** button to retrieve the records meeting those criteria.
- Enter a specific name and then click the **Search** button to retrieve one record in particular.
- Click on the **Search** button to display all records in a table format. Then scroll through the list and double-click on any record for selection.
- Click the **Reset** button to clear the selection criteria. This enables a new search.

After you select the desired record, it can be edited or deleted by clicking the **Edit** button or the **Delete** button**.**

To create a new record, click the **Add** button if one is available (most management screens). Help Desk Authority will display a data input form, like the Requester - Add window shown below:



All required fields are flagged with a red asterisk. Upon completion of the data entry form, click the **OK** button. The record will be saved, and you will be returned to the previous screen.

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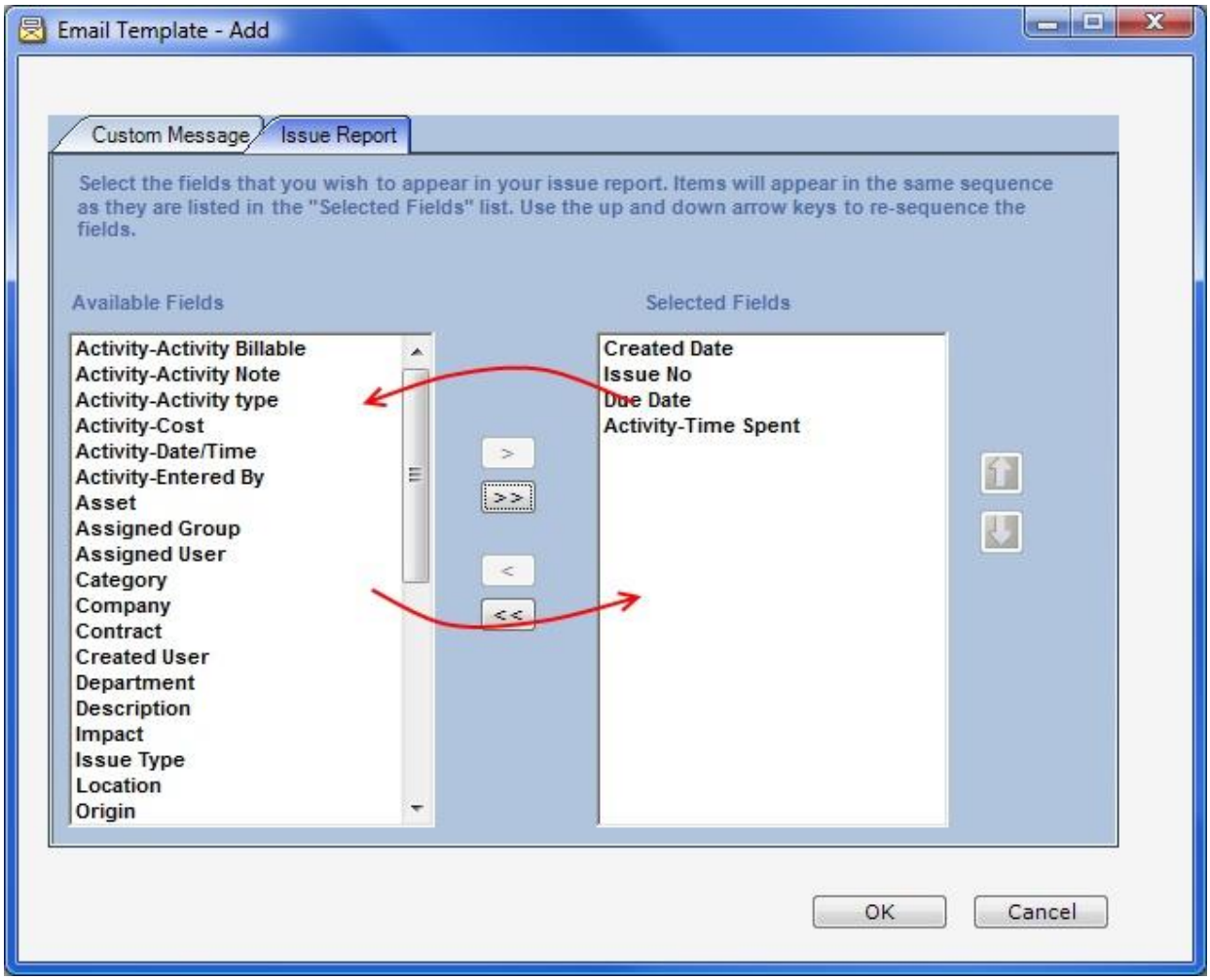
Selection Lists

Certain Help Desk Authority windows allow the selection of multiple items. For example:

- The Groups and Privileges window allows for the selection of multiple privileges to be permitted for a group, and multiple users can be assigned to that group.
- The Linked Products tab in the Contracts window allows the linking of multiple products to a contract.
- The Issue Report tab in the Email Template window allows the selection of multiple issue fields to define an issue report.

In addition to multiple selections, certain windows will allow you to choose the order in which the selections appear. An example of a selection list is below.



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Items on each side of the list window can be moved to the opposite side by using the arrow buttons as described below.

Button	Action
>	Move selected item to the right
>>	Move all items to the right
<	Move selected item to the left
<<	Move all items to the left
	Move selected item up one spot on the list
	Move selected item down one spot on the list

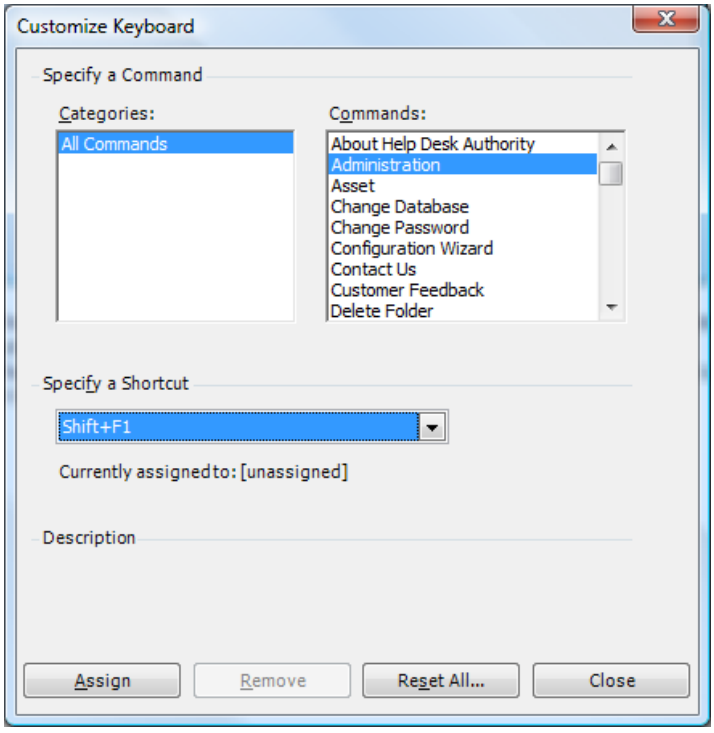
Once all items are in the correct location, click the **OK** button.

Keyboard Shortcuts

For users who prefer to use keyboard shortcuts over mouse clicks, Help Desk Authority now enables you to pre-define fifty-eight different keyboard shortcuts to increase your productivity. There are also several pre-defined keyboard shortcuts.

To define keyboard shortcuts:

1. Right-click on the Toolbar and select **Customize**. This will open the Customize window.
2. Click the **Keyboard…** button. This will open the Customize Keyboard window.



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3. In the **Commands** selection list, select the command for which you would like to create a keyboard shortcut.
4. In the **Specify a Shortcut** section drop-down menu, select the keyboard shortcut to associate with the selected command. In the example above, we have assigned the combination of Shift+F1 to open the Administration window.
5. Click the **Assign** button to complete the assignment.
6. To remove a single assignment, select the command in the **Commands:** selection list, then click the **Remove** button.
7. To reset all assigned keyboard shortcuts, click the **Reset All…** button.

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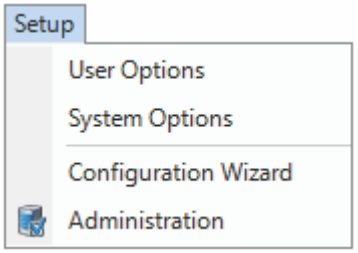
Chapter 2 – The Configuration Wizard

Introduction

One of the biggest changes in Help Desk Authority 9 is the advent of the Configuration Wizard. The Configuration Wizard enables you to configure many of the important settings of Help Desk Authority from one location. This allows you to begin working with Help Desk Authority right out of the box.

Note that most of the time, the items that can be set up in the Configuration Wizard will be set up under the Administration tab via the Administration window. For detailed instructions on these items, please review Chapter 3 – Administration.

The Configuration Wizard is accessed from the Setup menu as shown below.



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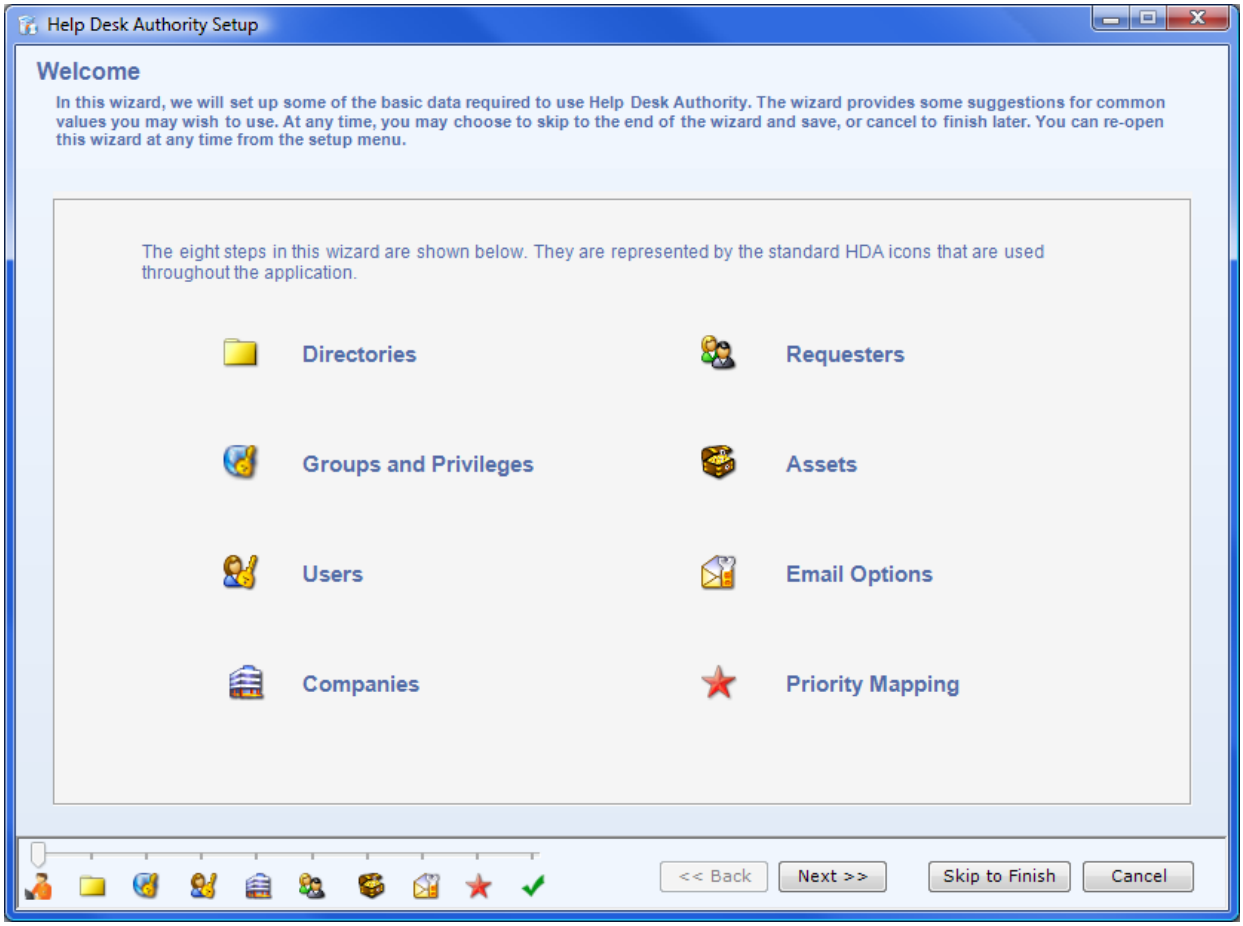
Welcome Screen

When the Configuration Wizard begins, the Help Desk Authority Setup window opens as shown below. This window will also appear on start-up after installing Help Desk Authority 9.x for the first time.


Help Desk Authority Setup
Welcome
In this wizard, we will set up some of the basic data required to use Help Desk Authority. The wizard provides some suggestions for common values you may wish to use. At any time, you may choose to skip to the end of the wizard and save, or cancel to finish later. You can re-open this wizard at any time from the setup menu.
The eight steps in this wizard are shown below. They are represented by the standard HDA icons that are used throughout the application.
Directories
Requesters
Groups and Privileges
Assets
Users
Email Options
Companies
Priority Mapping
<< Back
Next >>
Skip to Finish
Cancel

From this window, you can set up:

- Directories
- Groups and Privileges
- Users
- Companies
- Requesters
- Assets
- Email Options
- Priority Mapping

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Navigation

You can navigate through the wizard with the **Back** and **Next** buttons, or with the icon slider shown below.

With either navigation method, you can move forward and backward at any time. You also have the option of skipping various sections and completing the wizard by using the **Skip to Finish** button.

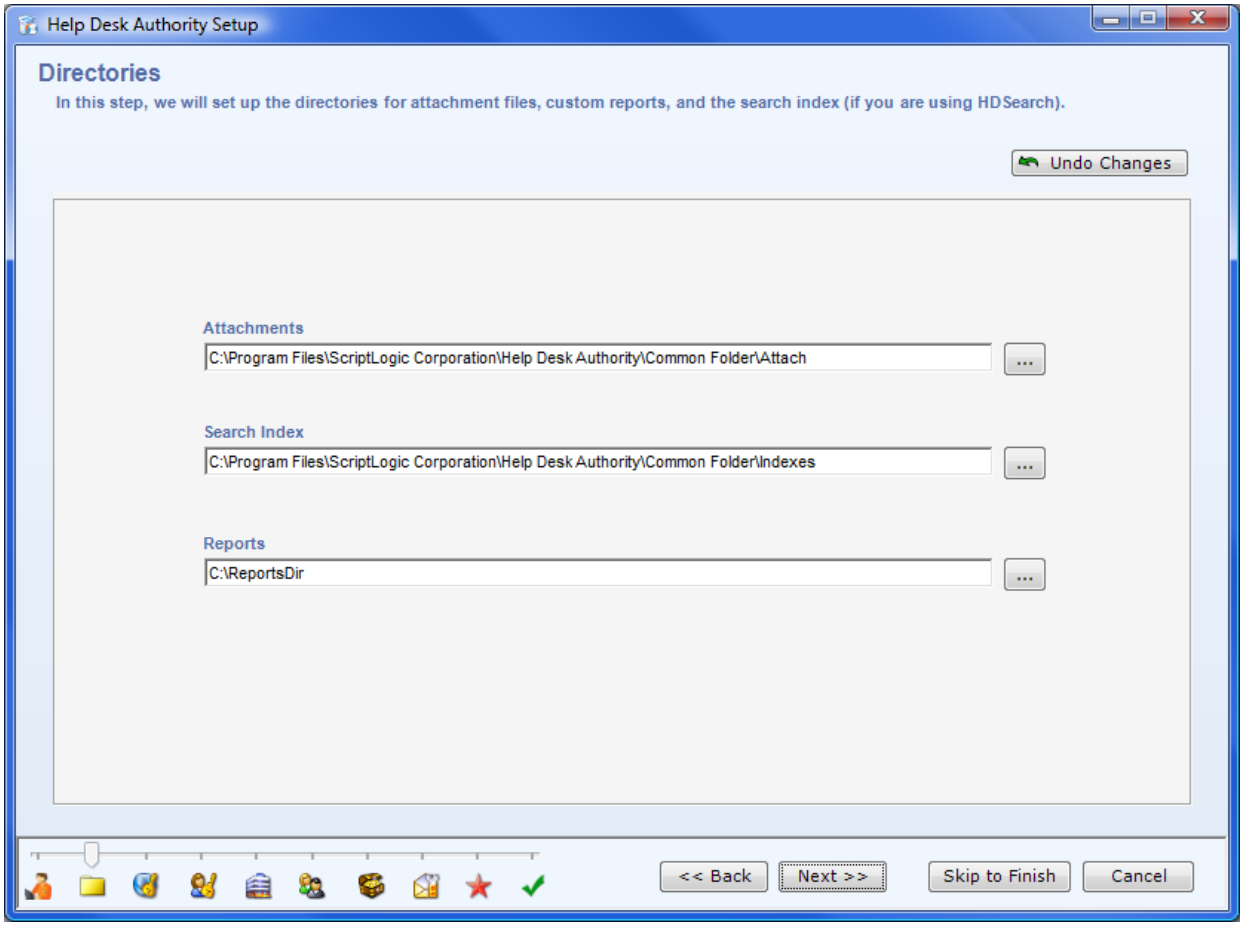
Most screens in the Configuration Wizard also contain a **Reset** button. You can use this button to clear all fields at any time.

Directories

The first step in the Configuration Wizard is the directory set-up. Here, you can assign directories for Attachment Files, Custom Reports and Search Index (for users using the HDSearch module).

Introduction

The Directories screen is shown below.



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Instructions

The first folder field is the storage location for any attachments used in Help Desk Authority.

Any type of file or clipboard item can be attached to requester, asset, or issue record as well as to Knowledge Base articles. An attached file is automatically copied to the Help Desk Authority attachments directory. The original file remains in the location from where it was retrieved. Clipboard items are automatically assigned a filename and stored in the Attachments directory.

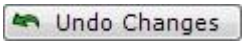
The Attachments directory may be included in the search index when using HDSearch. This will provide access to all attached files. Help Desk Authority's query and Knowledge Base features only search the Help Desk Authority database of information. HDSearch has the capability of searching your Help Desk Authority database as well as any file attachments.

1. Use the browse button to locate the folder to be used for storing attachments.

The next directory to be configured is the HDSearch Index. Each time an HDSearch Index is run, the file created is stored in the directory specified in the **Search Index** field on the Directories tab.

2. Use the browse button to locate the folder to be used for storing HDSearch Indexes.

The final directory to be configured is used for storing Custom Reports.

3. Use the browse button to locate the folder to be used for storing custom reports.
4. Click the **Next** button when finished to continue with the wizard, or click the **Skip to Finish** button to jump to the closing screen of the wizard.
5. To undo any changes you have made in all fields, click the 

button at any time.

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Groups and Privileges

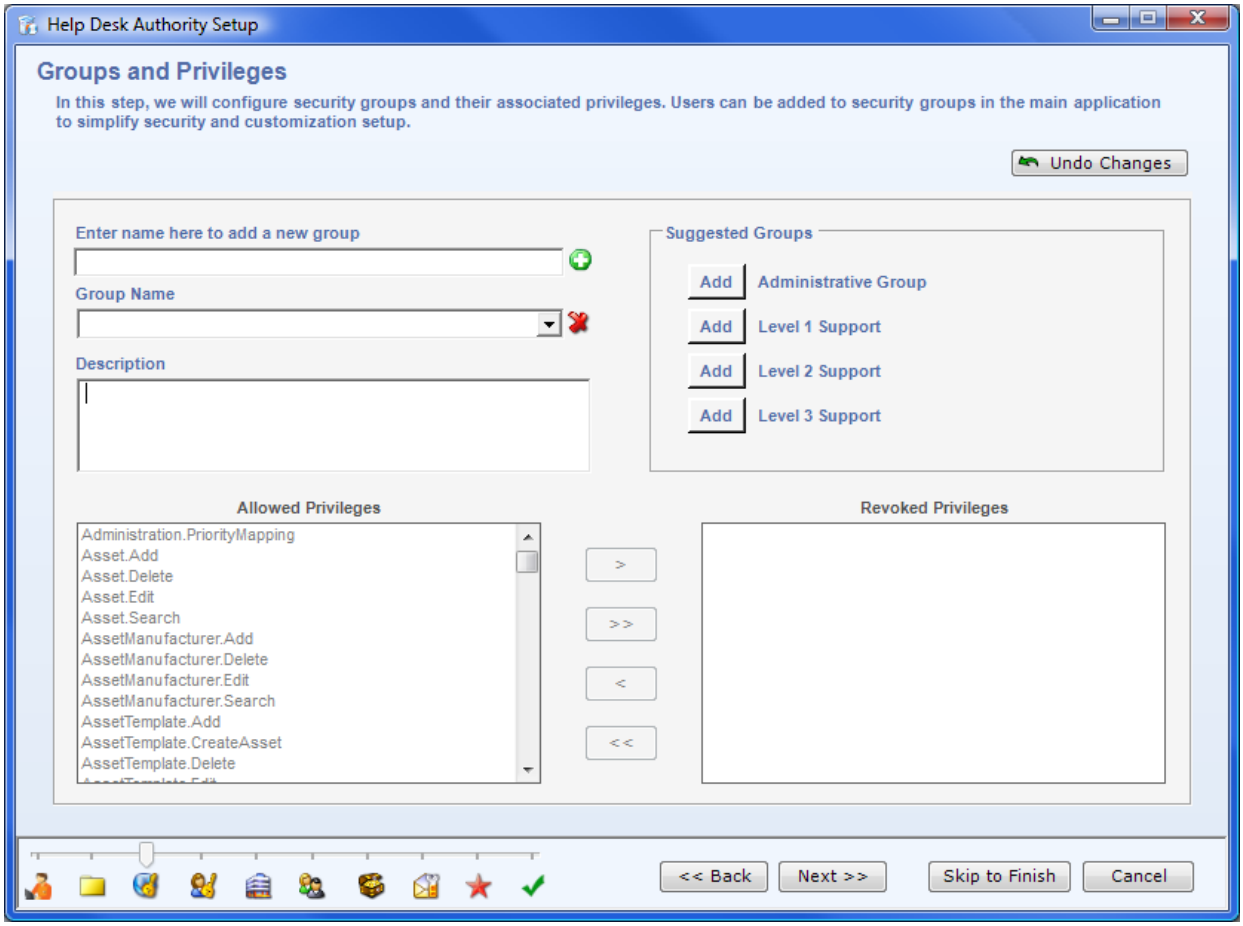
Help Desk Authority's security is structured around groups. Security permissions can easily be assigned to a group of users, such as "Technical Support" or "Help Desk Authority".

Introduction

After establishing Help Desk Authority users in the database, those users can then be assigned to a group. Each security group is then given access to specified Help Desk Authority functions. These functions are called privileges. Viewing an issue list, defining custom fields, deleting issues, and attaching files are all examples of privileges that can be assigned to a security group. Users may also be assigned to more than one security group for multiple levels of security and access.

Instructions

Below is the Groups and Privileges screen of the Configuration Wizard.



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To assign privileges, groups must first be created. To add a new group or groups, follow the steps below.

1. Enter a name for the new group in the **Enter name here to add a new group** field, and then click the green **+** button.
   OR
   Under **Suggested Groups**, click one of the **Add** buttons to select that group suggestion. The group name is a required field.
2. In the **Group Name** drop-down menu, the new group name will appear after clicking the down arrow.
3. Add a description to the new group by entering text into the **Description** field. This is not a required field, but if multiple groups are being created, a description is helpful. If one of the suggested groups is used, the description will be automatically created. Note that the description can be edited regardless of the method used to create the new group.

The next step is to assign privileges to the group. By default, new groups are not assigned privileges automatically. They must be added for each group. However, note that if the suggested group of "Administrative Group" is used, all available privileges are assigned, as this will usually be a top-level security group.

To assign privileges:

1. Make sure the current group is in the **Group Name** drop-down menu.
2. Select privileges listed in the Available Privileges pane and move them to the Selected Privileges pane using the arrow buttons (described in Chapter 1 under Selection Lists).
3. When finished creating groups and assigning privileges, click the **Next** button.
4. Click the **Next** button when finished to continue with the wizard, or click the **Skip to Finish** button to jump to the closing screen of the wizard.
5. To clear all fields, click the **Undo Changes** button at any time.

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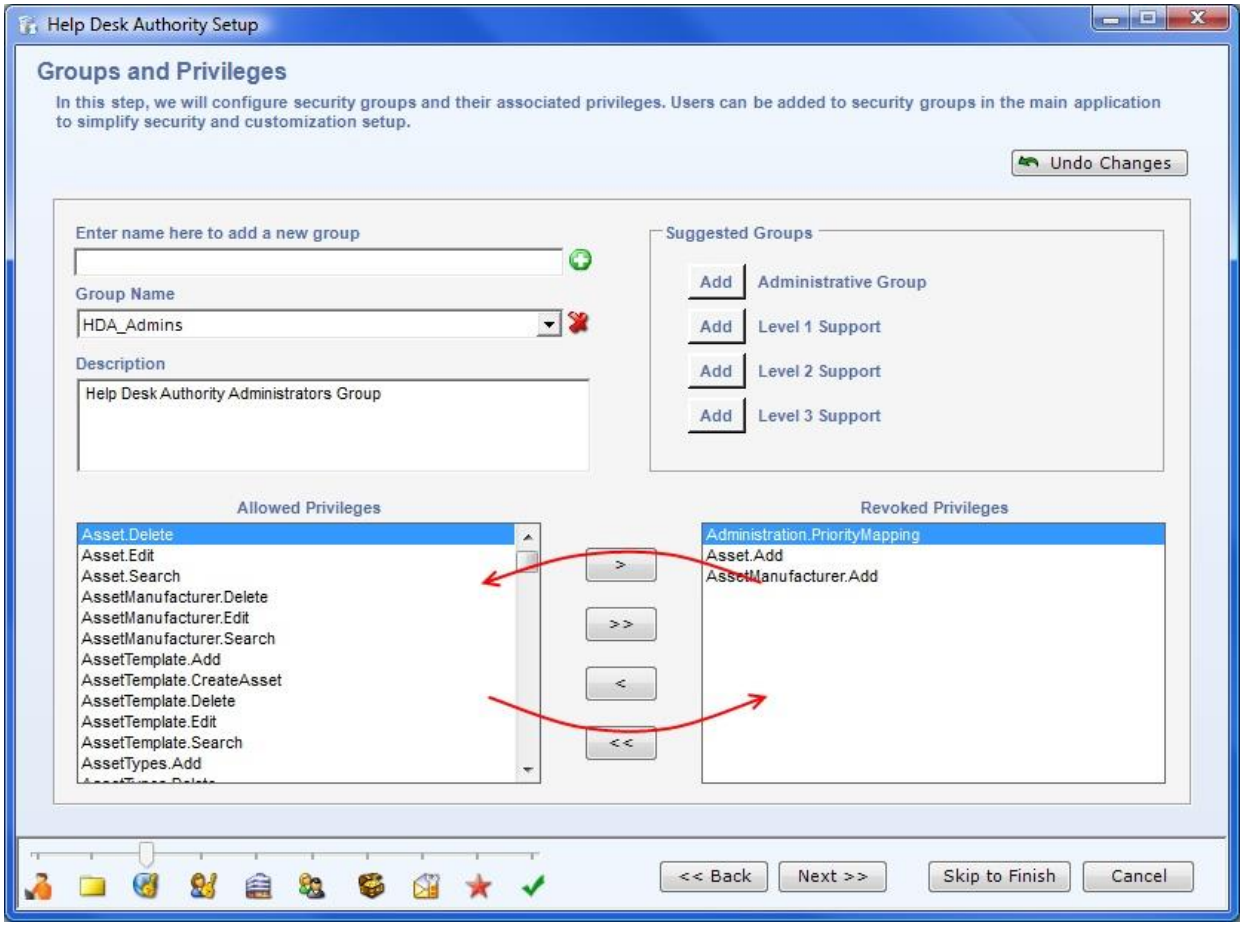
Example



In the above example, the suggested group “Level 2 Support” has been chosen. The description is the automatic default. Three privileges have been added.

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Users

Users are the people within an organization who use the Help Desk Authority system.

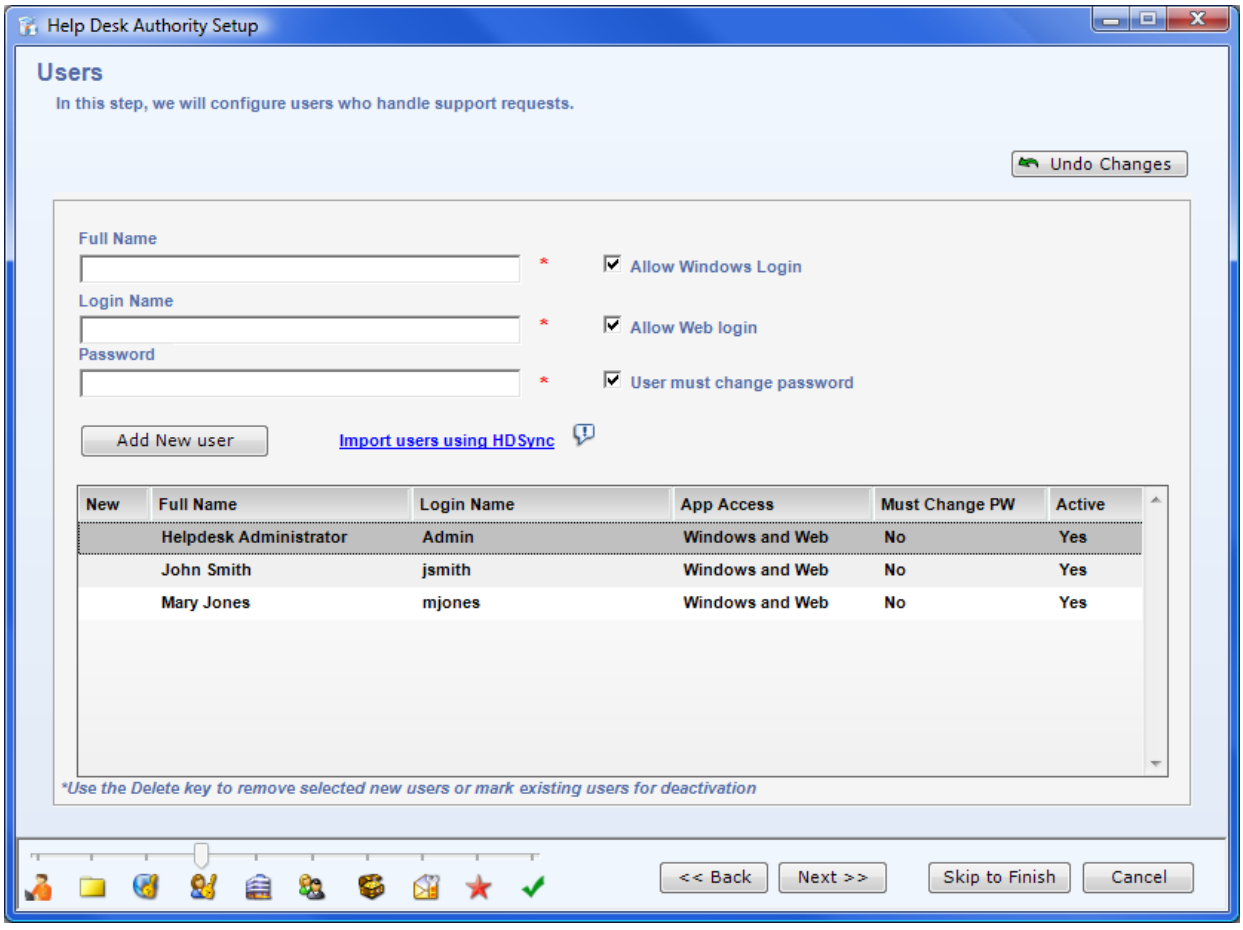
Introduction

When defining users, there are several options for consideration:

- Capture all pertinent information about the user such as name, email addresses and phone numbers.
- Assign a log on name and password.
- Setup login parameters.
- View the last time the user was logged into Help Desk Authority.
- Assign the user to pre-defined groups.
- Permit or deny the user access to Help Desk Authority menus and functions.
- Assign a skill level to the user as it relates to issue categories.

Although the only required information about a user is his/her full name, Help Desk Authority will be able to provide a more complete profile when needed if more information is included when creating a new user.

The Users screen is shown below.



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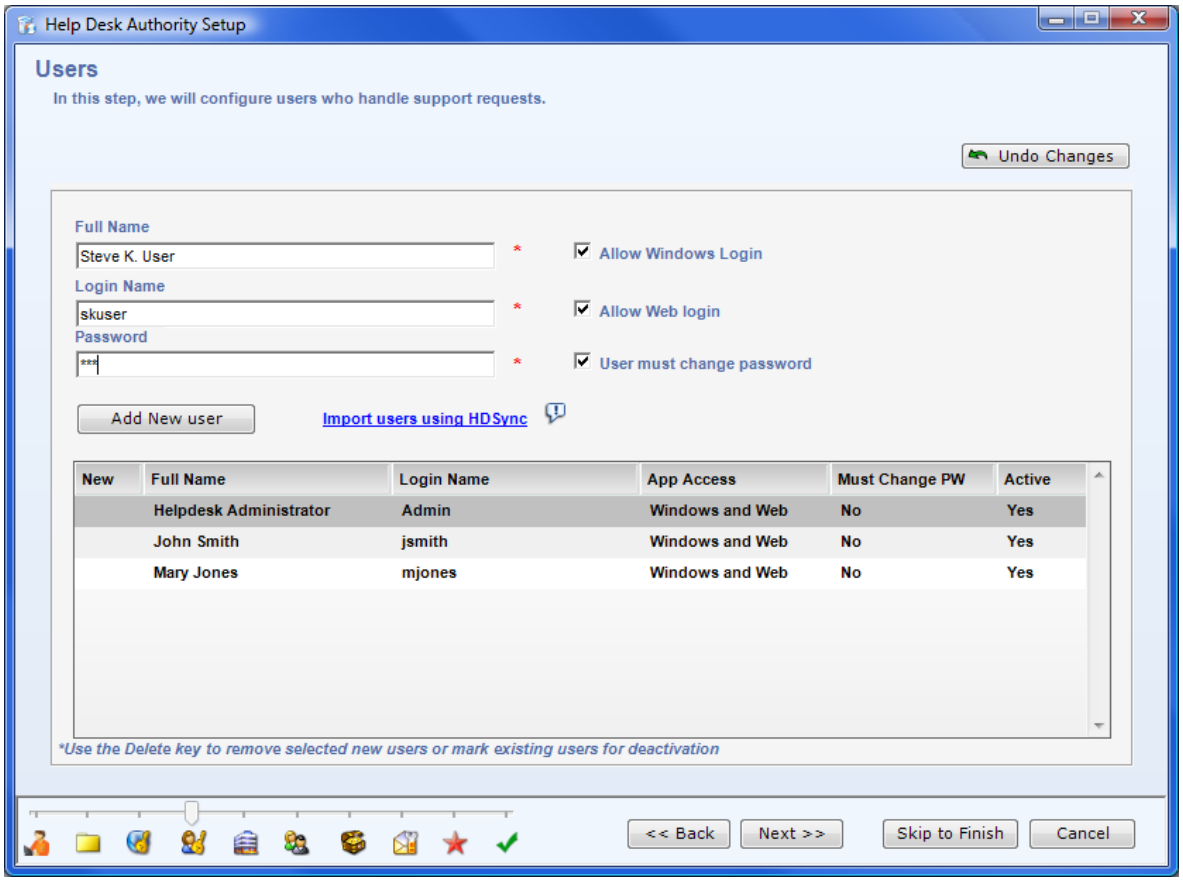
Instructions

To set up a new user, follow the steps below.

1. Enter the full name in the **Full Name** field (required).
2. Enter the chosen login name in the **Login Name** field (required).
3. Enter the chosen password in the **Password** field (required).
4. If the new user will be using the Help Desk Authority application for Windows, check the **Allow Windows Login** checkbox.
5. If the new user will be using the Web-enabled version of Help Desk Authority, check the **Allow Web Login** checkbox.
6. If the new user will be required to change his or her password, check the **User must change password** checkbox.
7. Click the **Add New User** button.
8. To add new users from the Active Directory using HDSync, click the **Import users using HDSync** link.
9. Click the **Next** button when finished to continue with the wizard, or click the **Skip to Finish** button to jump to the closing screen of the wizard.
10. The **Undo Changes** button can be used at any time to clear all the fields on this screen.

Example

First, the data entry fields are completed and the **Add New User** button is clicked.



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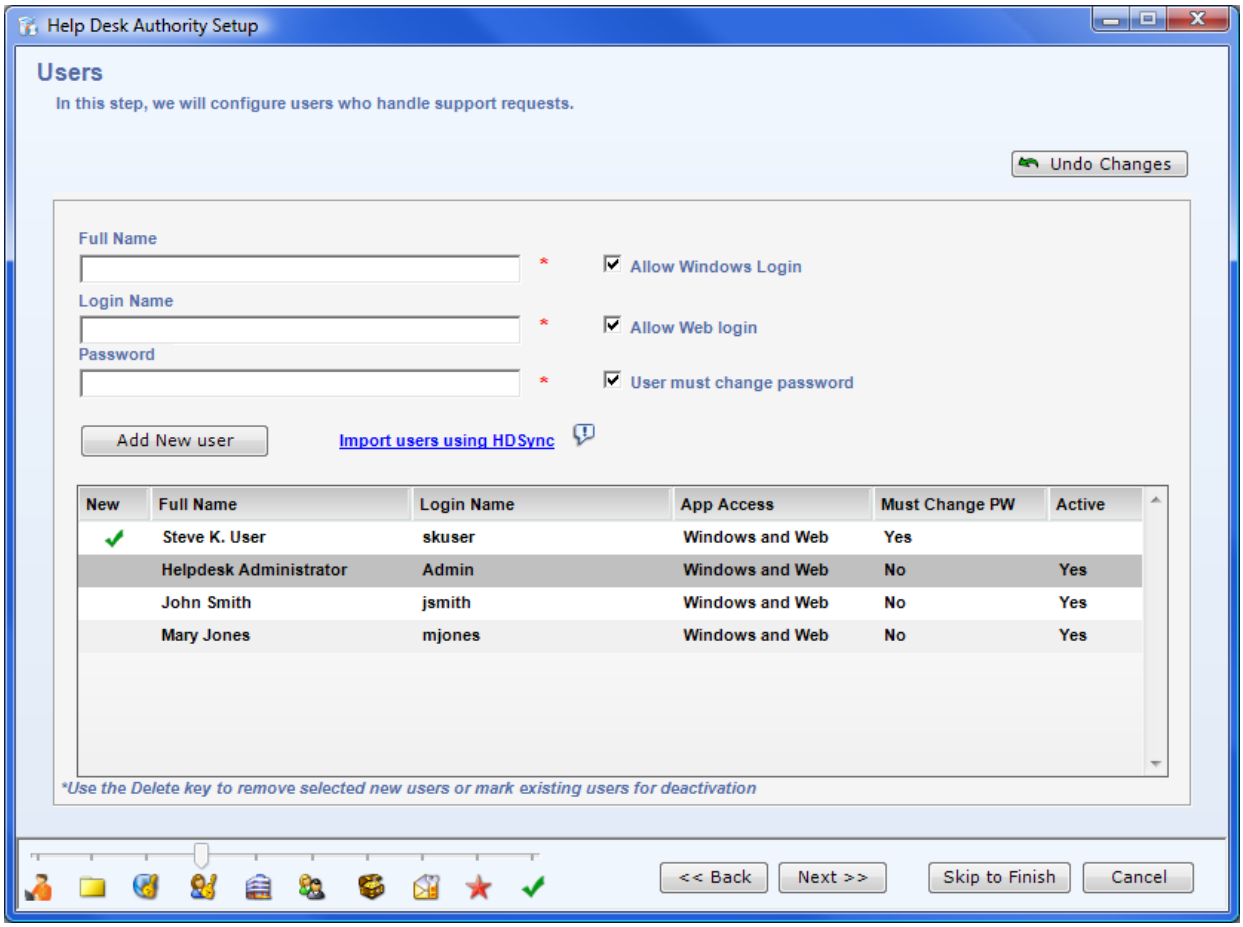
The new user is now visible in the user list as shown below.



In the above example, it is important to note that although the new user, Steve K User, was created, he will not be listed as an active user until the Configuration Wizard has finished.

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Companies

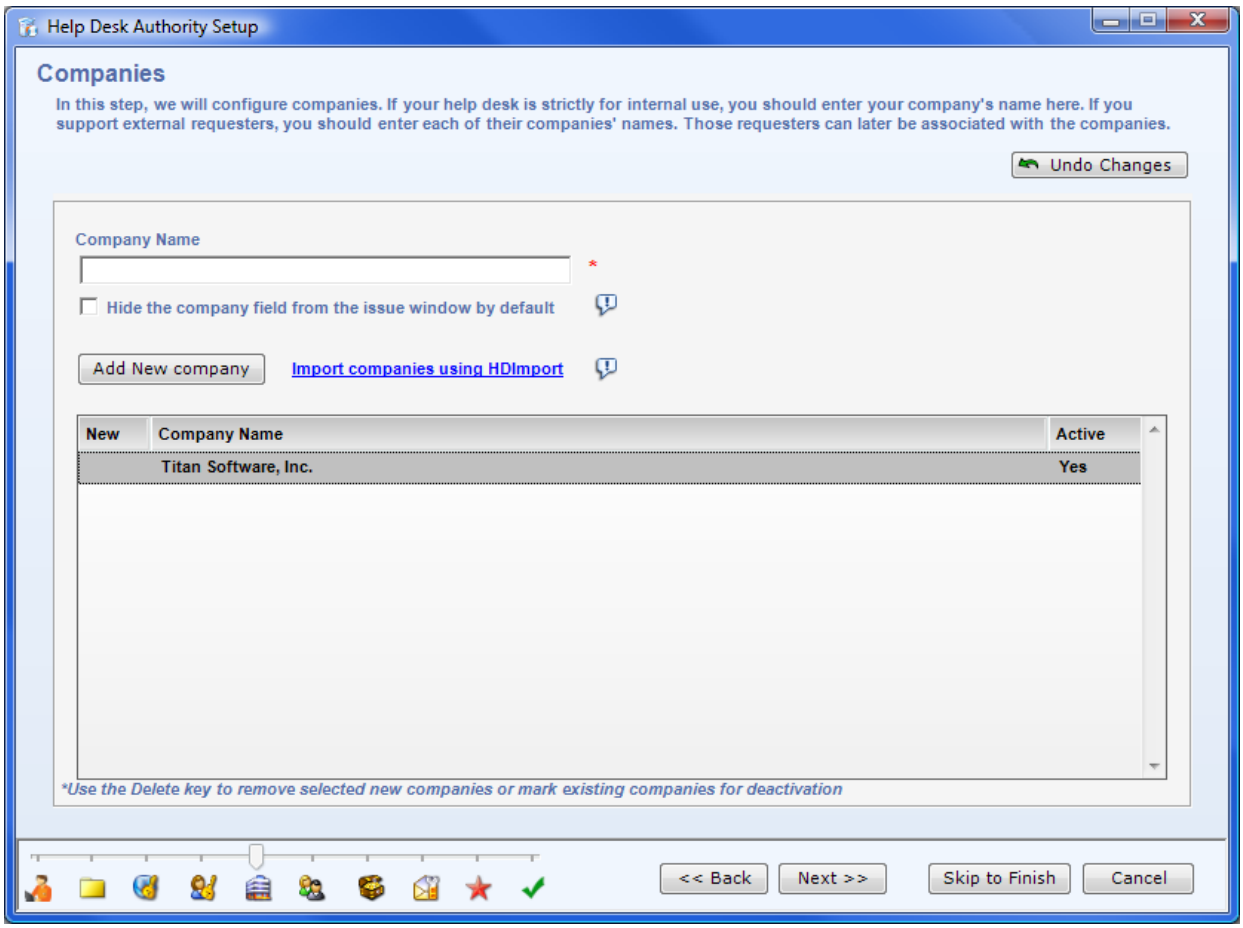
Companies are the entities that employ the customers of Help Desk Authority.

Introduction

Requesters are not always affiliated with a company, but when they are, pertinent company information can be gathered and linked to requesters.

Although the only required information about a company is the full name of the business, Help Desk Authority will be able to provide a more complete profile when needed if more information is included when creating a new company.

The Company screen is shown below.


Help Desk Authority Setup
Companies
In this step, we will configure companies. If your help desk is strictly for internal use, you should enter your company's name here. If you support external requesters, you should enter each of their companies' names. Those requesters can later be associated with the companies.
Undo Changes
Company Name
Hide the company field from the issue window by default
Add New company
Import companies using HDImport
New
Company Name
Active
Titan Software, Inc.
Yes
*Use the Delete key to remove selected new companies or mark existing companies for deactivation
<< Back
Next >>
Skip to Finish
Cancel

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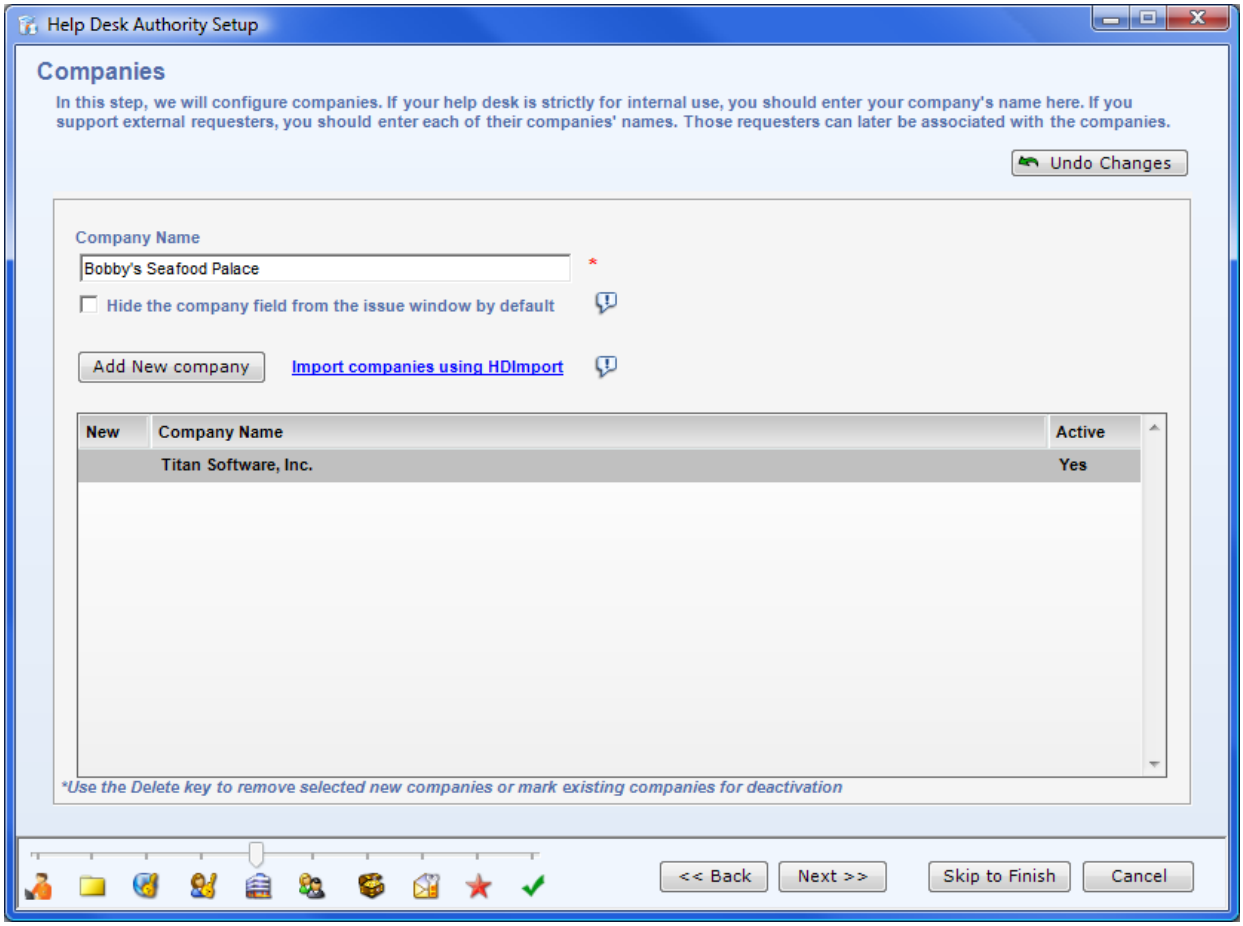
Instructions

To add a new company, follow the steps below.

1. Enter the new company name in the **Company Name** field (required).
2. Click the **Add New Company** button.
3. To add new companies using the HDImport module, click the **Import companies using HDImport** link.
4. Click the **Next** button when finished to continue with the wizard, or click the **Skip to Finish** button to jump to the closing screen of the wizard.
5. The **Undo Changes** button can be used at any time to clear all the fields on this screen.

Example

The new company name is entered into the **Company Name** field.


Help Desk Authority Setup
Companies
In this step, we will configure companies. If your help desk is strictly for internal use, you should enter your company's name here. If you support external requesters, you should enter each of their companies' names. Those requesters can later be associated with the companies.
Undo Changes
Company Name
Bobby's Seafood Palace
Hide the company field from the issue window by default
Add New company
Import companies using HDImport
New
Company Name
Active
Titan Software, Inc.
Yes
*Use the Delete key to remove selected new companies or mark existing companies for deactivation
<< Back
Next >>
Skip to Finish
Cancel

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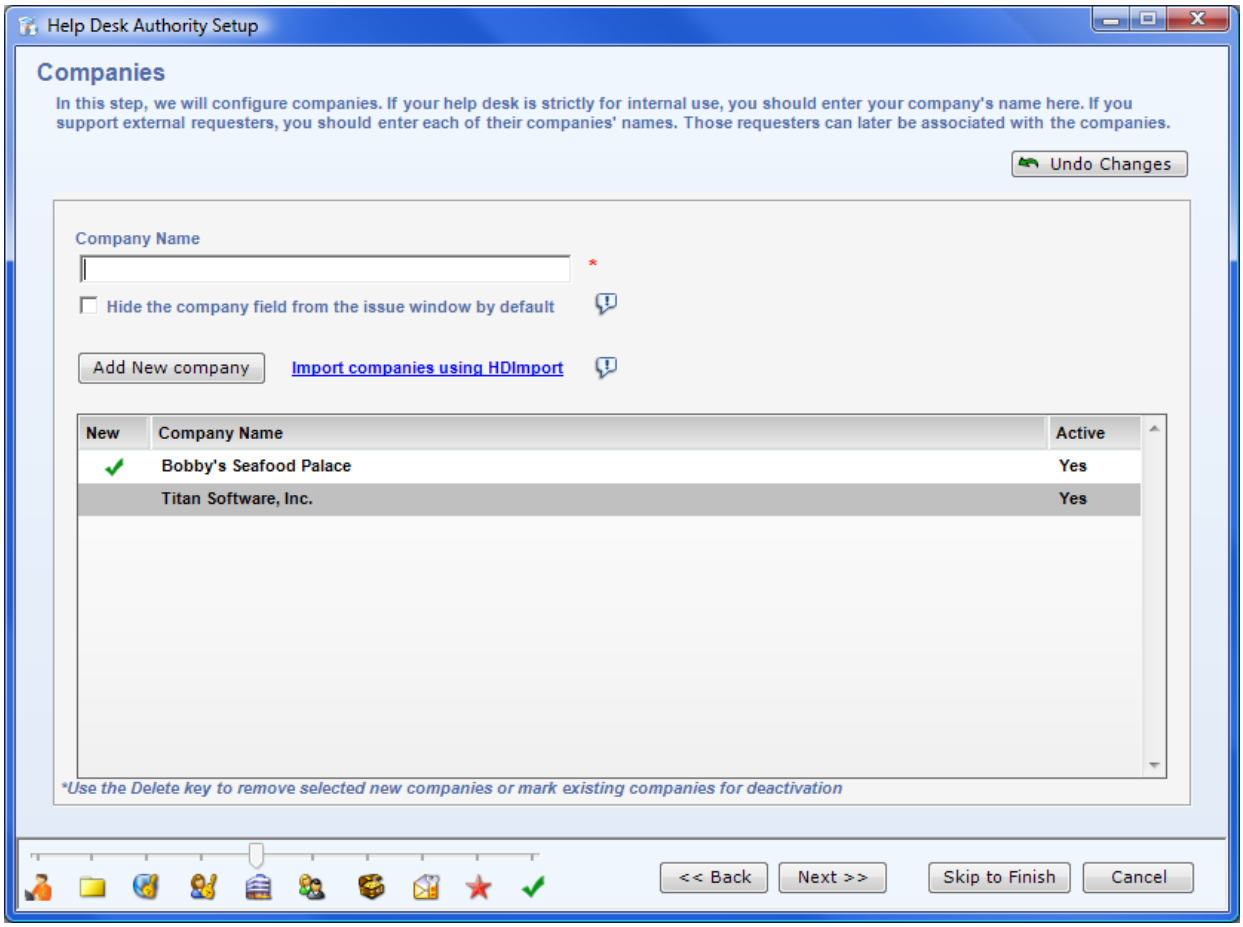
The **Add New Company** button is clicked, and the new company appears in the company list.


Help Desk Authority Setup
Companies
In this step, we will configure companies. If your help desk is strictly for internal use, you should enter your company's name here. If you support external requesters, you should enter each of their companies' names. Those requesters can later be associated with the companies.
Undo Changes
Company Name
Hide the company field from the issue window by default
Add New company
Import companies using HDImport
New
Company Name
Active
Bobby's Seafood Palace
Yes
Titan Software, Inc.
Yes
*Use the Delete key to remove selected new companies or mark existing companies for deactivation
<< Back
Next >>
Skip to Finish
Cancel

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Requesters

Requesters—formerly referred to as customers in previous versions of Help Desk Authority—are those individuals calling your help desk for assistance.

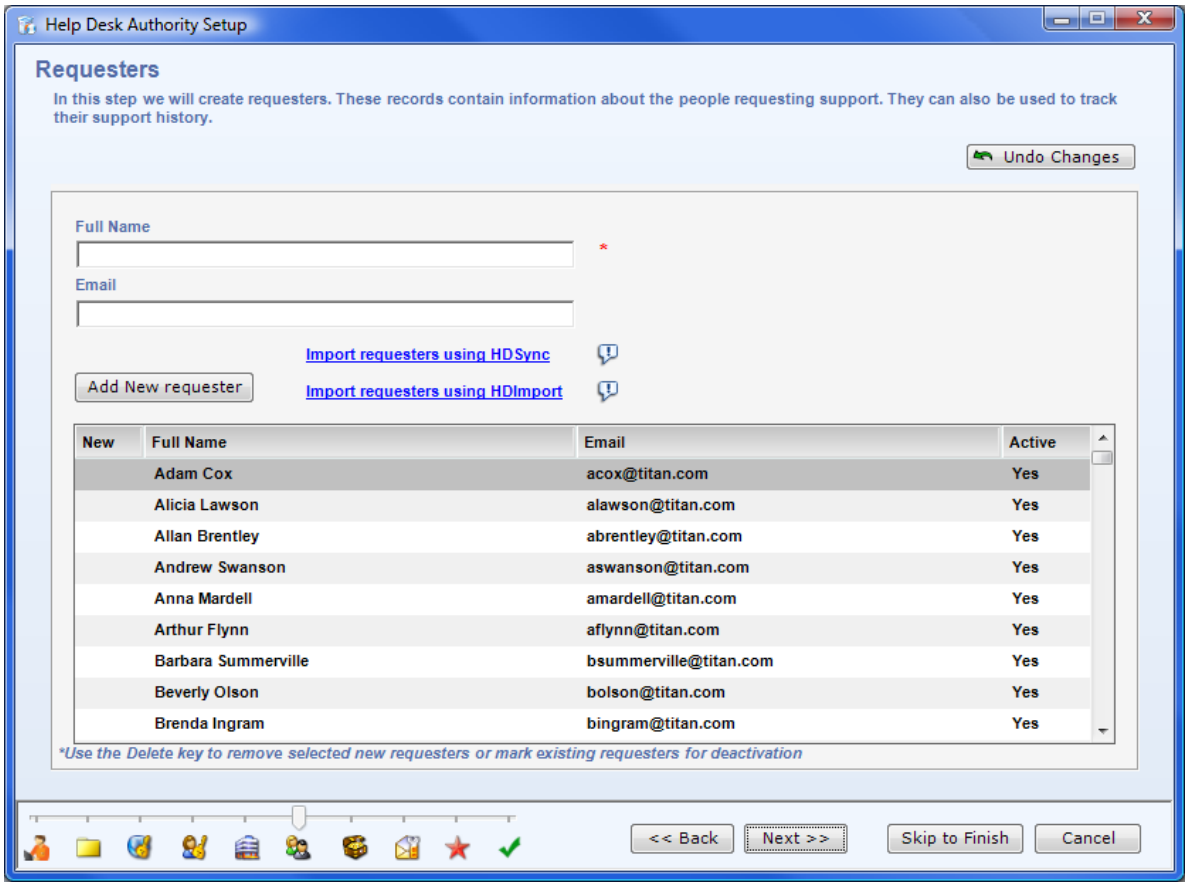
Introduction

Requesters may or may not be affiliated with a company. If a requester is affiliated with a company, a company record should be created to attach to the requester. (For more information on creating company records, see “Companies” in the previous section).

Although the only required information about a requester is his/her full name, the more information you enter for that company, the better Help Desk Authority will be able to provide a complete profile when needed.

If Help Desk Authority users will be serviced within the organization, they will also be designated as requesters. Therefore, in addition to a user record, a requester record must also be created for each one. (For more information, see the “Users” section earlier in this user’s manual.)

The Requesters screen is shown below.



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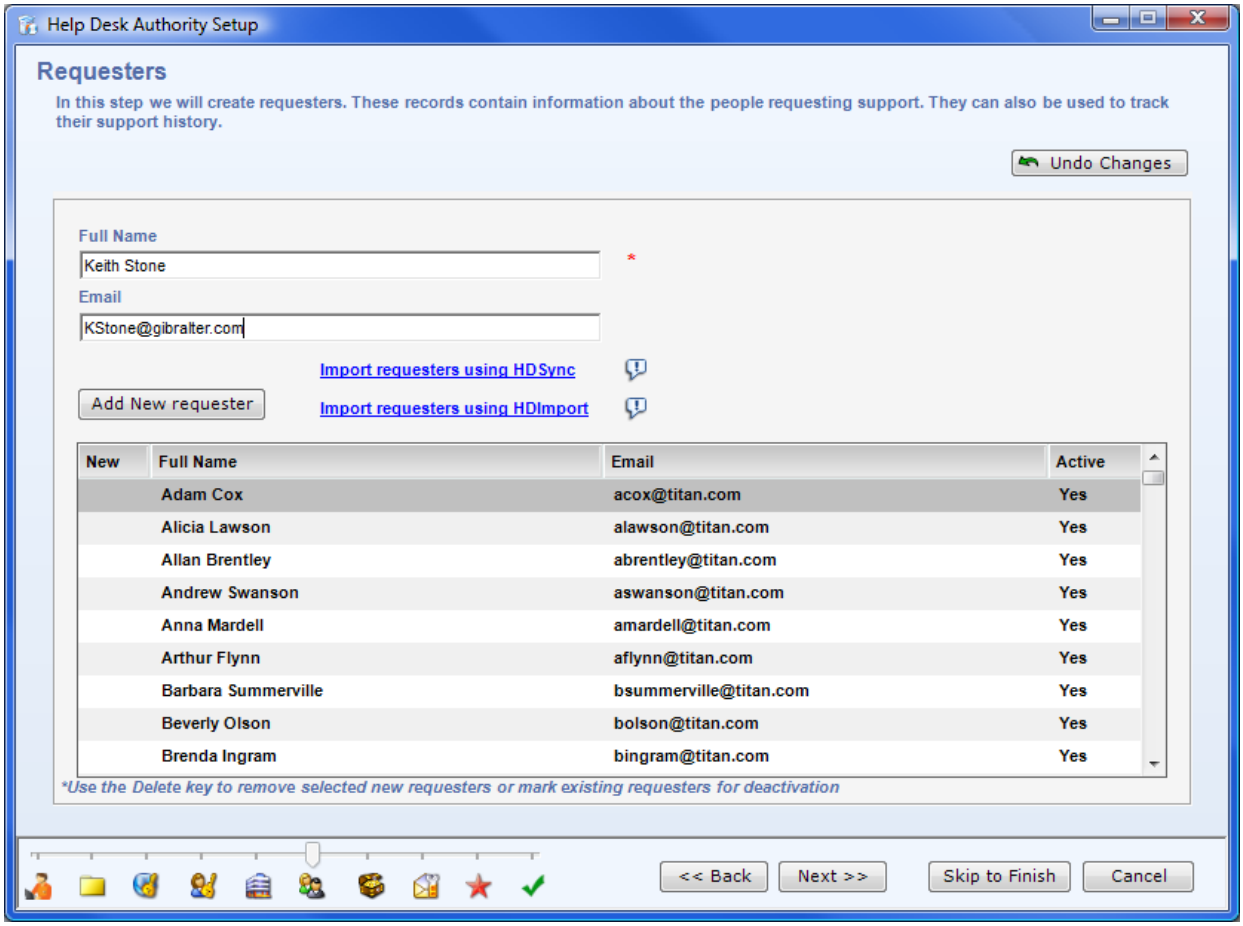
Instructions

1. Enter the full name of the requester in the **Full Name** field (required).
2. Enter the email address of the requester in the **Email** field.
3. Click the **Add New Requester** button.
4. The requester will now be visible in the requester list in the lower portion of the Requesters screen.
5. To import requesters using the HDSync module, click on the **Import requesters using HDSync** link.
6. To import requesters using the HDImport module, click on the **Import requesters using HDImport** link.
7. Click the **Next** button when finished to continue with the wizard, or click the **Skip to Finish** button to jump to the closing screen of the wizard.
8. The **Undo Changes** button can be used at any time to clear all the fields on this screen.

Example

The requester's full name is entered into the **Full Name** field, and the requester's email address is entered into the **Email** field.


Help Desk Authority Setup
Requesters
In this step we will create requesters. These records contain information about the people requesting support. They can also be used to track their support history.
Undo Changes
Full Name
Keith Stone
Email
KStone@gibralter.com
Import requesters using HDSync
Add New requester
Import requesters using HDImport
New
Full Name
Email
Active
Adam Cox acox@titan.com Yes
Alicia Lawson alawson@titan.com Yes
Allan Brentley abrentley@titan.com Yes
Andrew Swanson aswanson@titan.com Yes
Anna Mardell amardell@titan.com Yes
Arthur Flynn aflynn@titan.com Yes
Barbara Summerville bsummerville@titan.com Yes
Beverly Olson bolson@titan.com Yes
Brenda Ingram bingram@titan.com Yes
*Use the Delete key to remove selected new requesters or mark existing requesters for deactivation
<< Back
Next >>
Skip to Finish
Cancel

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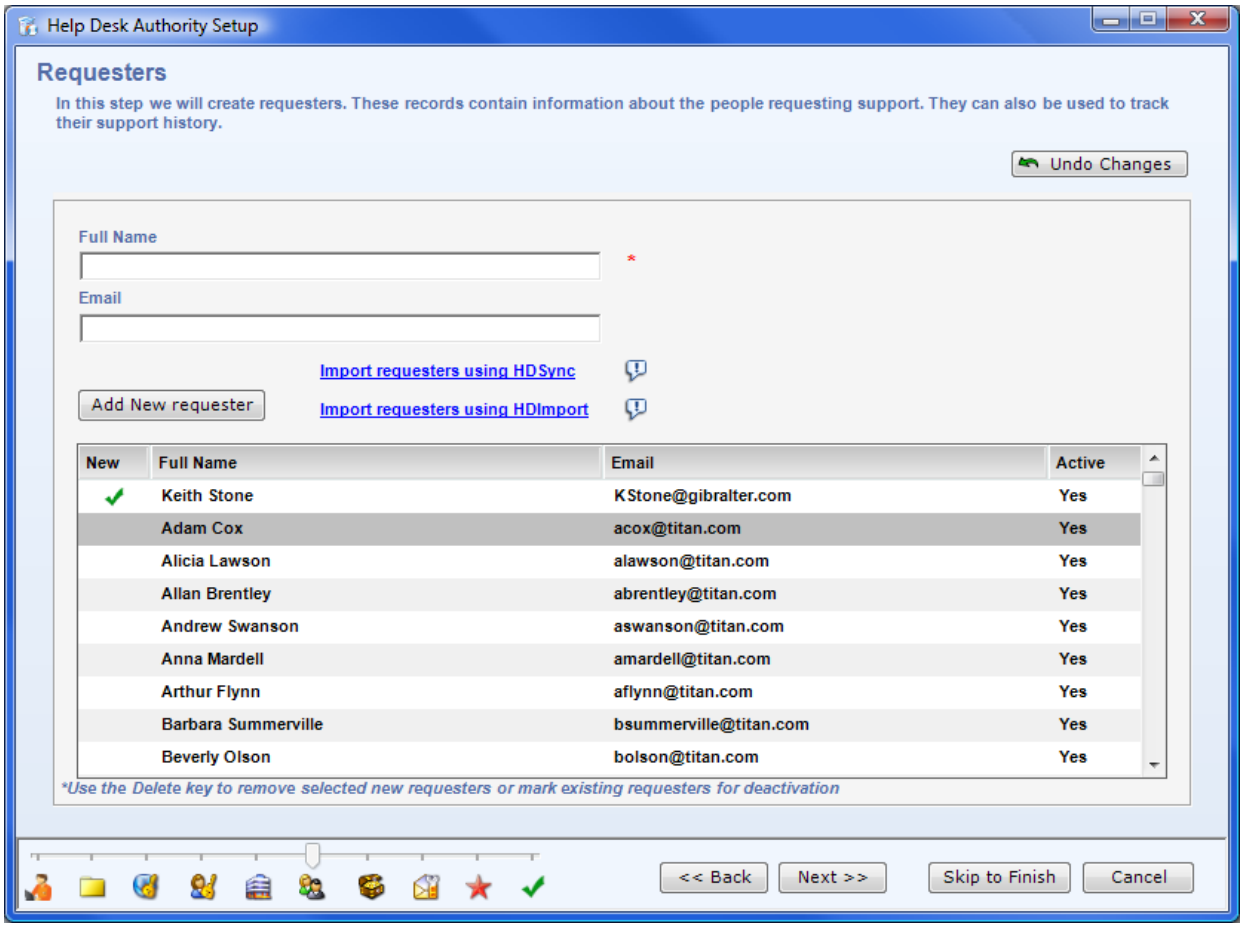
The **Add New Requester** button is clicked, and the new requester, Steve L. Requester is now visible in the requesters list.



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Assets

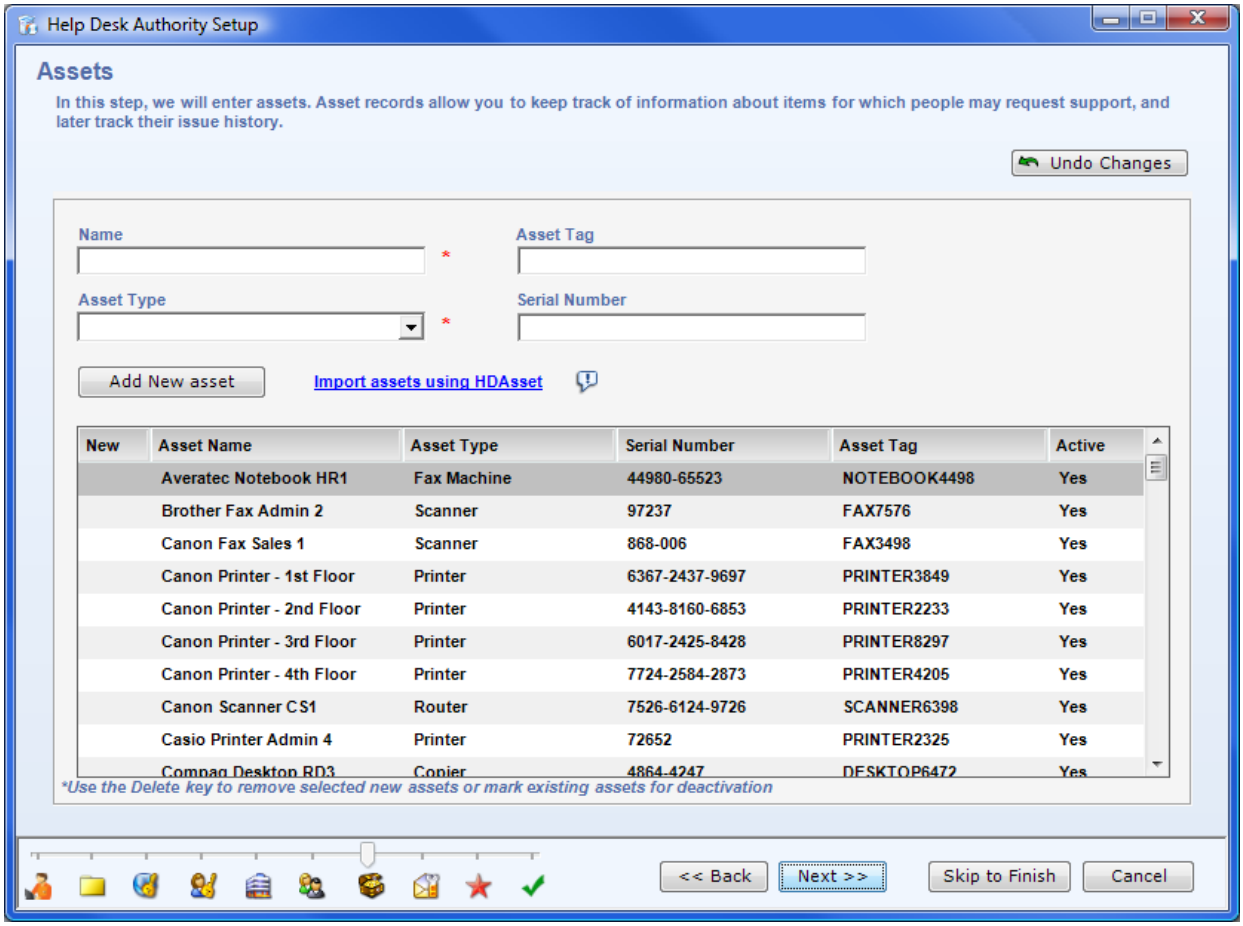
Help Desk Authority provides a means for keeping an inventory of an organization's assets. In addition to storing information such as serial numbers, locations, and manufacturers, key information about the vendors who have sold or who lease the assets to you can also be captured.

Asset types are now set up under Setup > Administration (opens the Administration window) > Asset Management > Asset Types.

Introduction

Inventory procedures can be expanded with the HDAsset module. HDAsset is Quest's computer inventory application. It will automatically perform network scans and computer audits of hardware, software, peripherals, components and system information.

Adding individual assets can be done in the Configuration Wizard as outlined by the steps in this section. The Asset screen is shown below.



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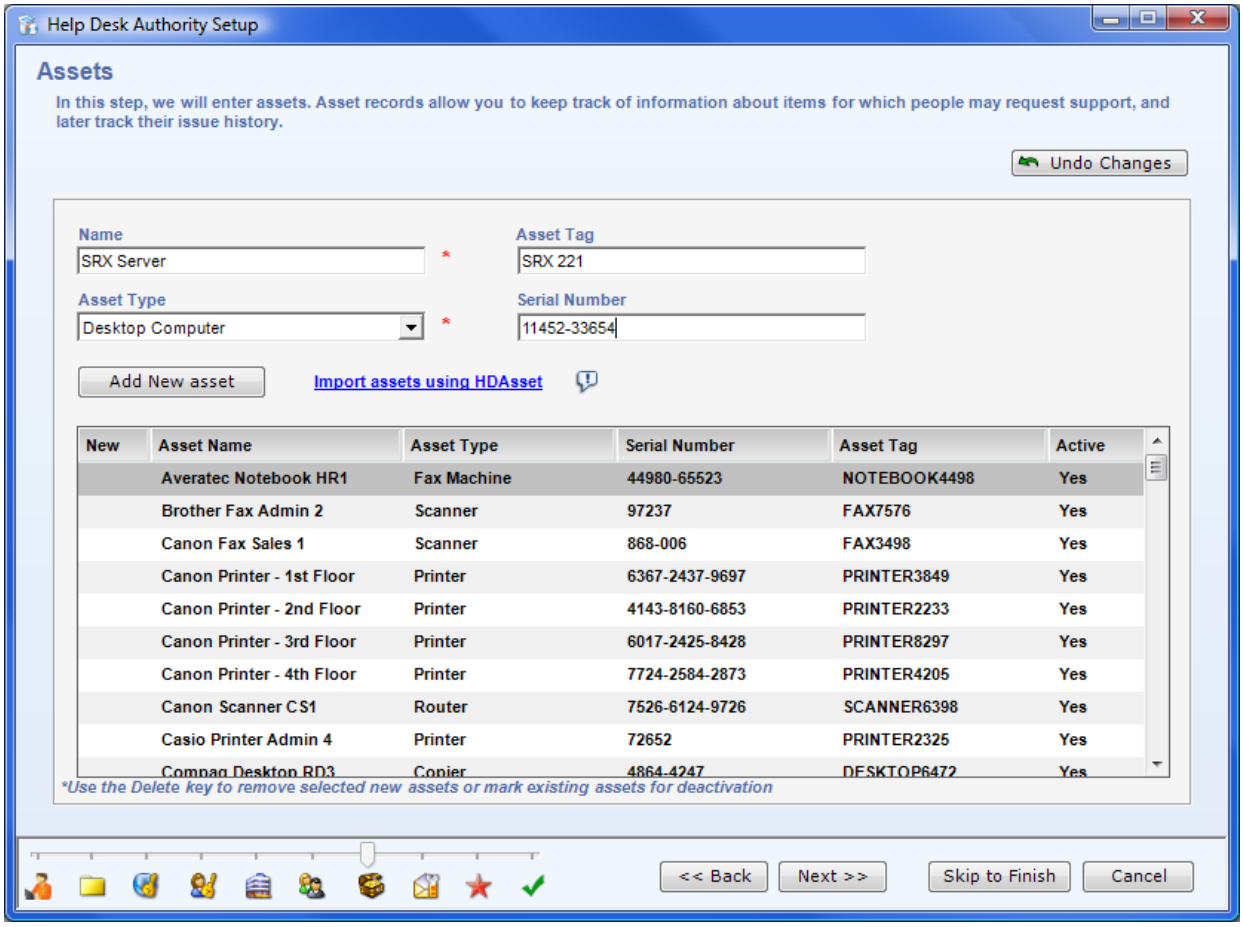
Instructions

To add an asset, follow the instructions below.

1. Enter the name of the asset in the **Name** field (required).
2. Select the asset type from the **Asset Type** drop-down menu (required).
3. Enter the asset tag information in the **Asset Tag** field. An asset tag can be any information about the asset, such as a model number or a style type.
4. Enter the serial number of the asset in the **Serial Number** field if applicable.
5. Click the **Add New Asset** button.
6. If you would like to import multiple assets using HDAsset, click on the **Import assets using HDAsset** link.
7. Click the **Next** button when finished to continue with the wizard, or click the **Skip to Finish** button to jump to the closing screen of the wizard.
8. The **Undo Changes** button can be used at any time to clear all the fields on this screen.

Example

The **Name**, **Asset Tag**, **Asset Type** and **Serial Number** fields have been completed with the information regarding the new asset.



The **Add New Asset** button has been clicked and the new asset is now visible in the Asset list.

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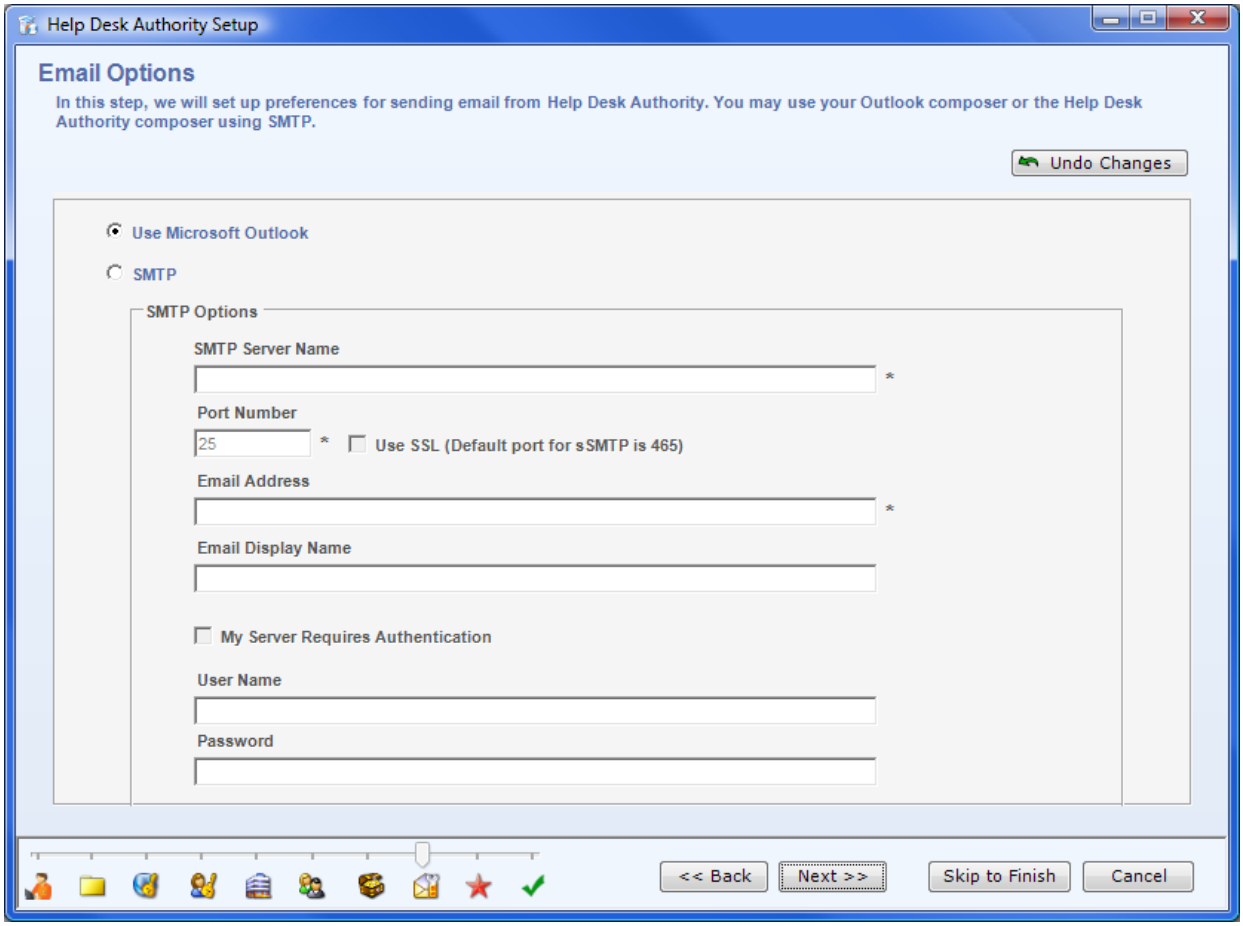
Email Options

The Email Options window enables you to configure preferences for sending email from Help Desk Authority.

Introduction

Help Desk Authority is capable of automatically sending email to requesters regarding issues. The set-up is very similar to setting up an email client.



Instructions

1. Select **Use Microsoft Outlook** or **SMTP** using the radio buttons.
2. If **SMTP** is selected, enter the SMTP Server Name in the **SMTP Server Name** field.
3. Enter the Port Number in the **Port Number** field (check the **Use SSL** checkbox if using secure email).
4. Enter the user's email address in the **Email Address** field.
5. Enter the desired display name in the **Email Display Name** field.
6. If the email server requires authentication, check the **My Server Requires Authentication** checkbox and enter the user name and password in the **User Name** and **Password** fields.

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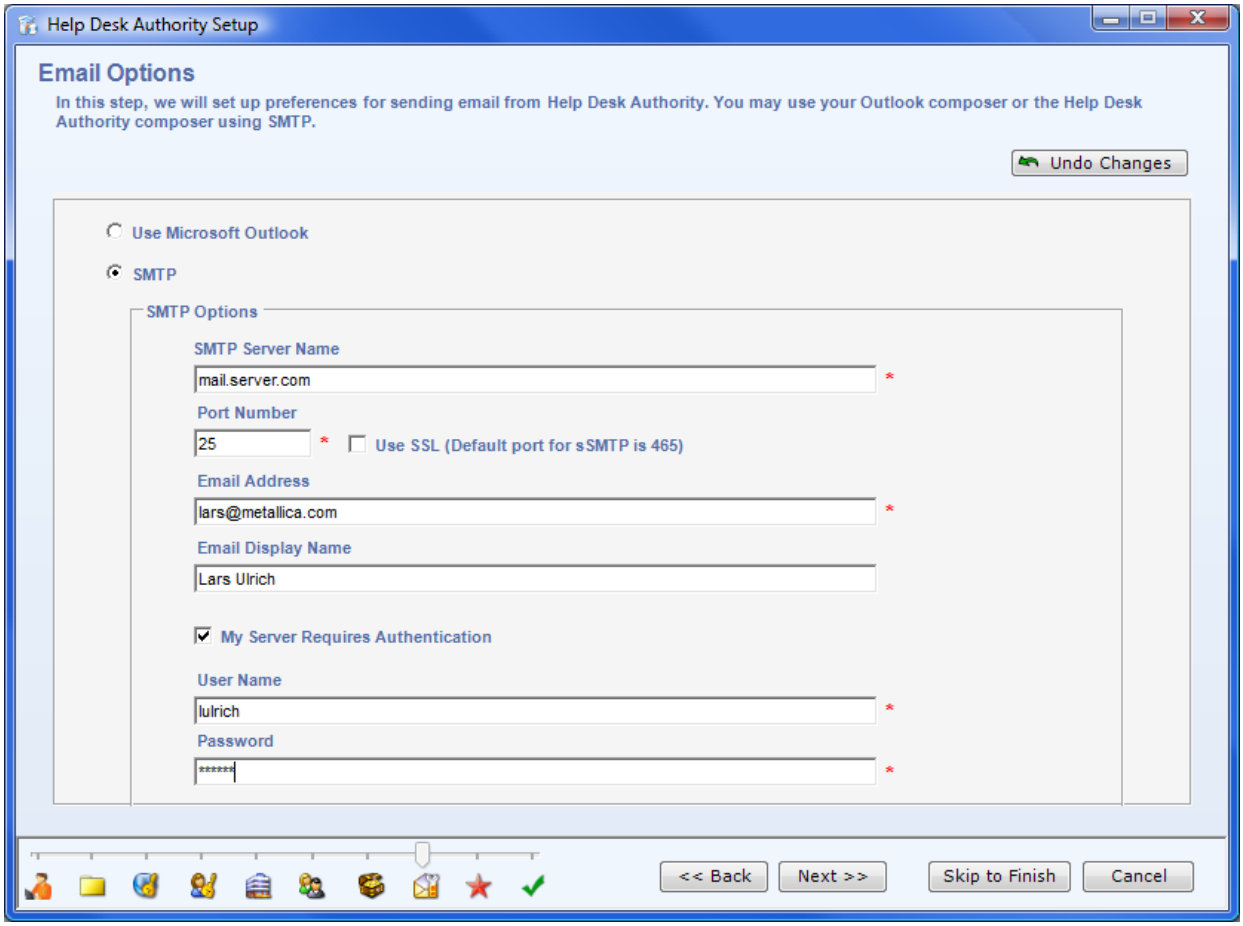
7. Click the **Next** button when finished to continue with the wizard, or click the **Skip to Finish** button to jump to the closing screen of the wizard.
8. To clear all fields, click the **Undo Changes** button at any time.

Example

Below is an example of a completed email set-up.



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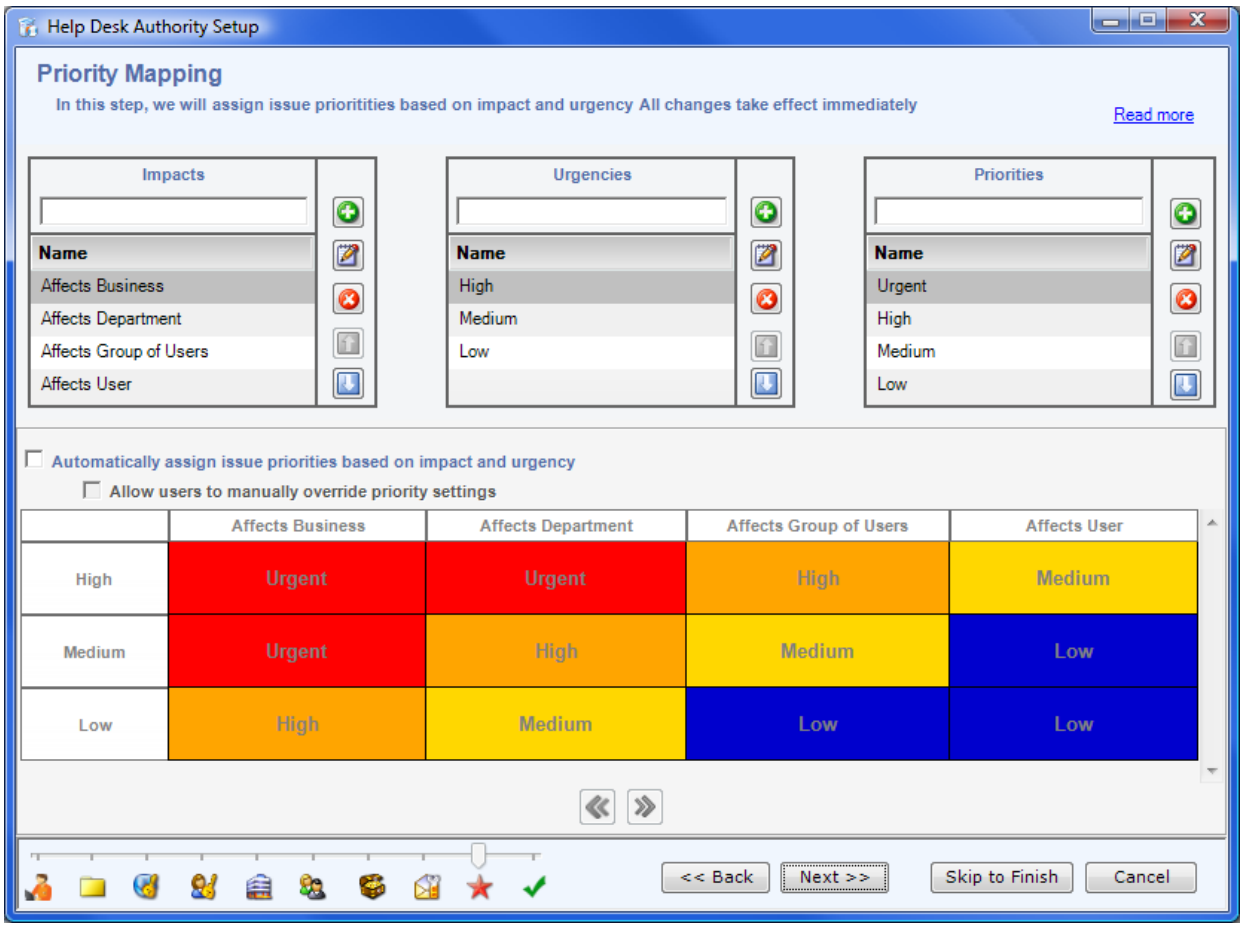
Priority Mapping

The Priority Mapping window enables you to configure impacts, urgencies and priorities.

Introduction

Priority mapping is a feature that allows users to define levels of priority—based on impact and urgency—for every phase of the Issue lifecycle. Priorities are automatically categorized on a scale from highest to lowest. The scale is graphically represented on a color-coded grid marked with Urgencies and Impacts.



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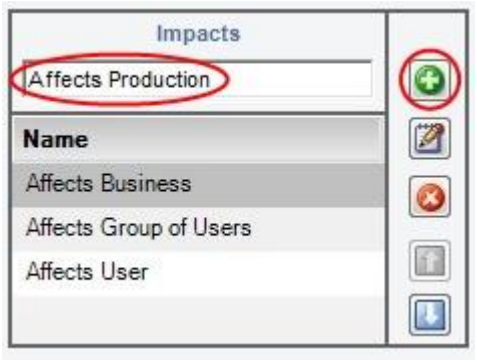
Instructions

Adding an Impact

1. In the Impacts text field, enter the name of the new Impact, then click the button.
2. The Impact will now be visible in the Name column of the Impact list.



3. You can delete the Impact by selecting it, then clicking the button. When prompted for confirmation, click the **Yes** button.
4. To edit the Impact, select it, then click the button, or simply double-click the name of the Impact.
5. To change the order of your Impacts, select one and use the or keys to arrange them.

Adding an Urgency

1. In the Urgencies text field, enter the name of the new Urgency, then click the button.
2. The Urgency will now be visible in the Name column of the Urgency list.

3. You can delete the Urgency by selecting it, then clicking the button. When prompted for confirmation, click the **Yes** button.
4. To edit the Urgency, select it, then click the button, or simply double-click the name of the Urgency.

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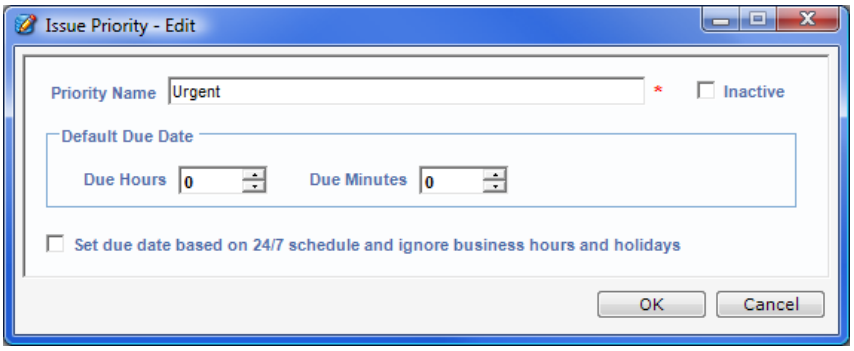
5. To change the order of your Urgencies, select one and use the or keys to arrange them.

Adding a Priority

1. In the Priorities text field, enter the name of the new Priority, then click the button.
2. The Priority will now be visible in the Name column of the Priority list.

3. You can delete the Priority by selecting it, then clicking the button. When prompted for confirmation, click the **Yes** button.
4. To edit the Priority, select it, then click the button, or simply double-click the name of the Priority. Editing a Priority is different from editing an Impact or Urgency. In a Priority, not only can you edit the name, but the default due date can also be edited as shown below.



5. To change the order of your Priorities, select one and use the or keys to arrange them.

Adjusting the Mapping Grid

To adjust Priorities up or down in the Priority Mapping grid:

1. Check the "**Automatically assign issue priorities based on impact and urgency**" checkbox. This allows for adjustments to the Priority Mapping grid. Also, if you would like to allow the user to override the Priority settings, check the checkbox labeled "**Allow users to manually override priority settings**".

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Automatically assign issue priorities based on impact and urgency
Allow users to manually override priority settings

2. Select the Priority you wish to shift up or down in importance.
3. Using the and buttons below the Priority Map, expand the selected Priority level to the appropriate Impact and Urgency levels.

Example:

In the screen shot below, the Priority "2 - High", which intersects the "Medium" Urgency and the "Affects Department" Impact, is selected.

	Affects Business	Affects Department	Affects Sales	Affects User	Affects Group
Urgent	1 - Urgent	1 - Urgent	1 - Urgent	2 - High	3 - Medium
High	1 - Urgent	1 - Urgent	2 - High	3 - Medium	3 - Medium
Medium	1 - Urgent	2 - High	3 - Medium	3 - Medium	4 - Low
Low	2 - High	3 - Medium	3 - Medium	4 - Low	4 - Low

Clicking the button after selecting the above priority will change the Priority Levels of several Impacts and Urgencies by expanding the "2 – High" Priority level to the left. Note also that this shifts the "1 – Urgent" Priority to the left, resulting in a lower Priority for some Urgency/Impact combinations.

	Affects Business	Affects Department	Affects Sales	Affects User	Affects Group
Urgent	1 - Urgent	1 - Urgent	2 - High	2 - High	3 - Medium
High	1 - Urgent	2 - High	2 - High	3 - Medium	3 - Medium
Medium	2 - High	2 - High	3 - Medium	3 - Medium	4 - Low
Low	2 - High	3 - Medium	3 - Medium	4 - Low	4 - Low

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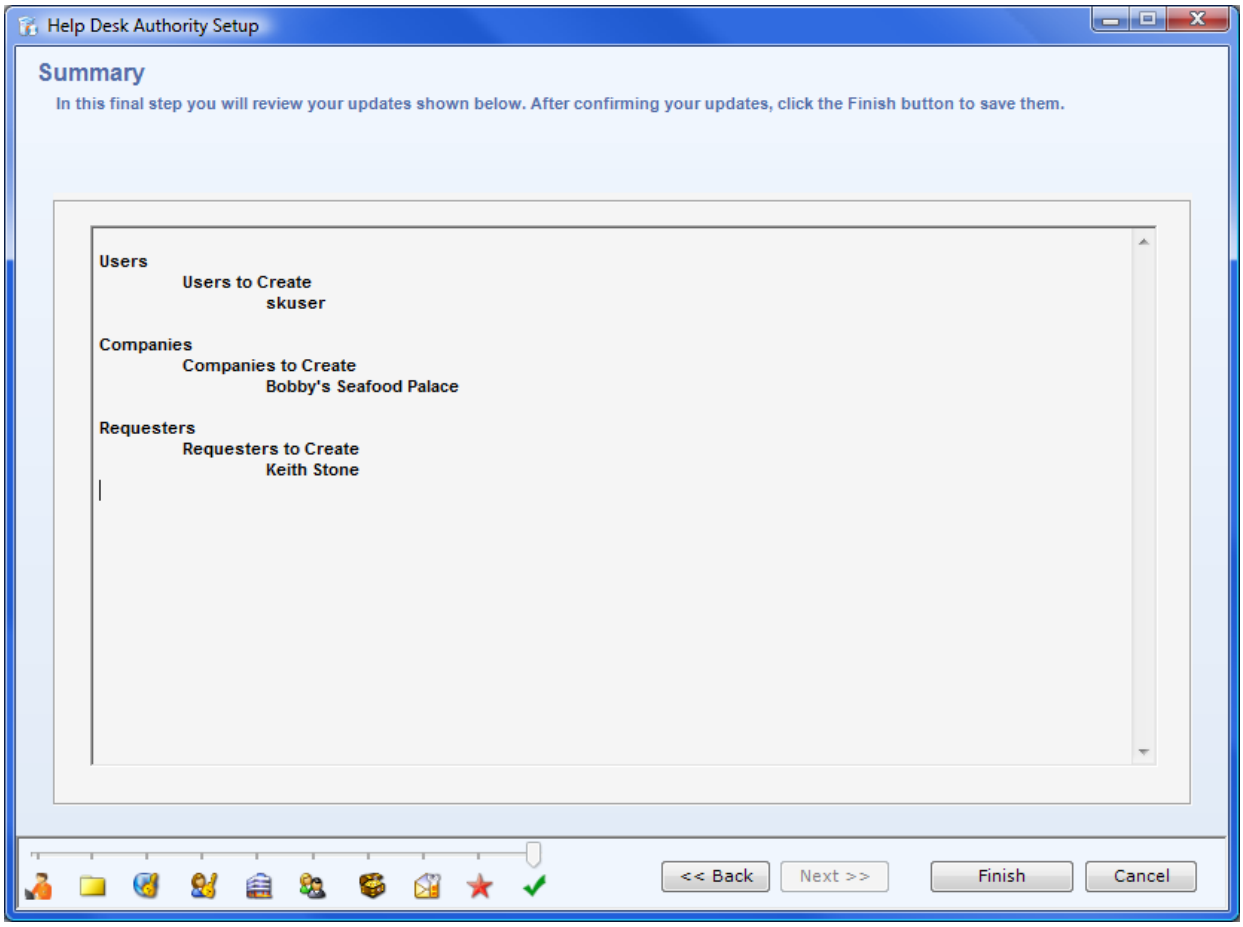
Summary

The final screen of the Configuration wizard is the Summary screen shown below.



The summary screen will list all of the updates you have made in the wizard before saving and exiting. If you are not satisfied with your changes, you can go back and make any changes necessary.

When you are satisfied with the updates you have made, click the **Finish** button to exit the Configuration Wizard.

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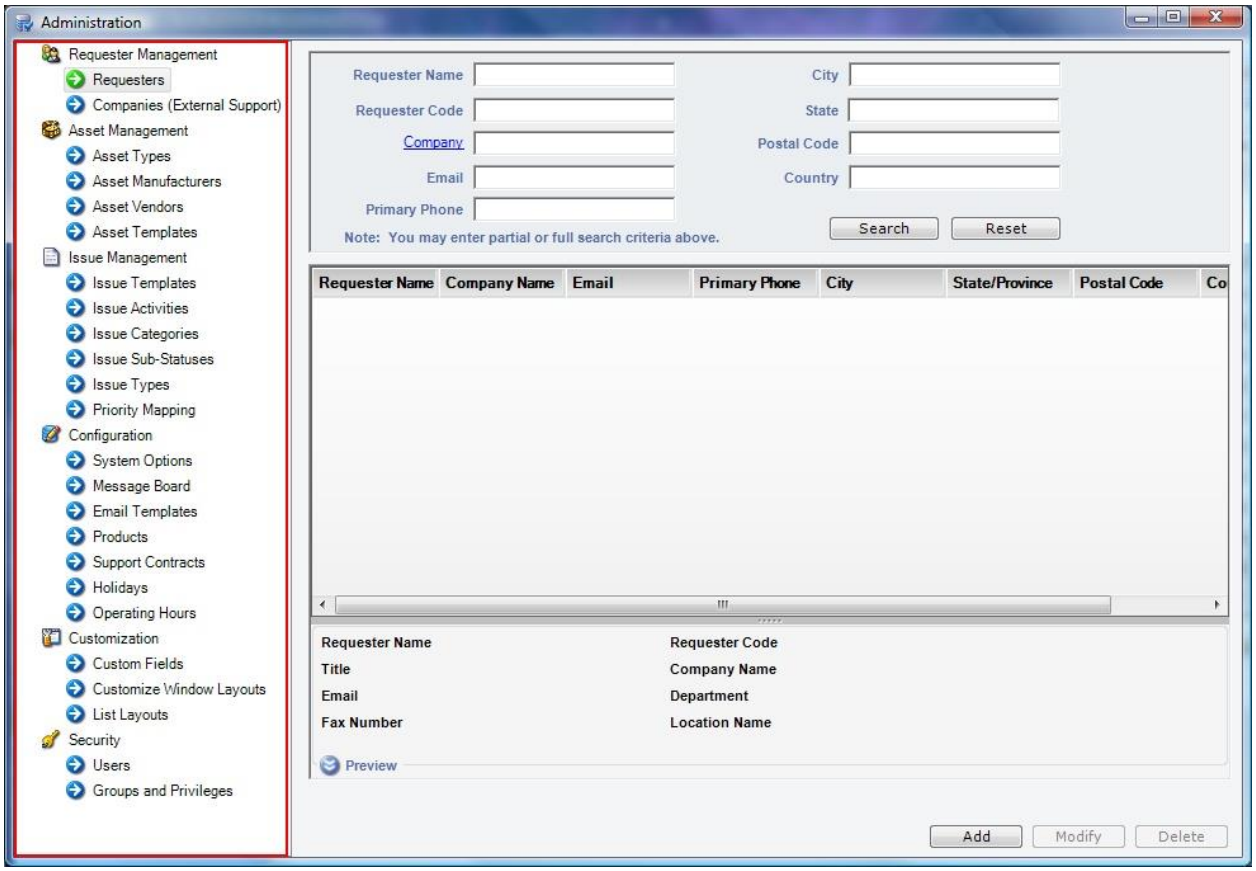
Chapter 3 – Administration

Administration, available through the Setup Menu in the Main Menu under Administration, manages the items used in creating issues in Help Desk Authority. Selecting Administration from the Setup Menu opens the Administration window as shown below with the sidebar navigation in the red frame.



In the Administration window you can:

- Manage requesters and companies
- Perform searches
- Manage assets
- Manage issues
- Configure the Help Desk Authority system
- Customize Help Desk Authority
- Configure security

In this section, we will cover all of the above in detail.

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Requester Management

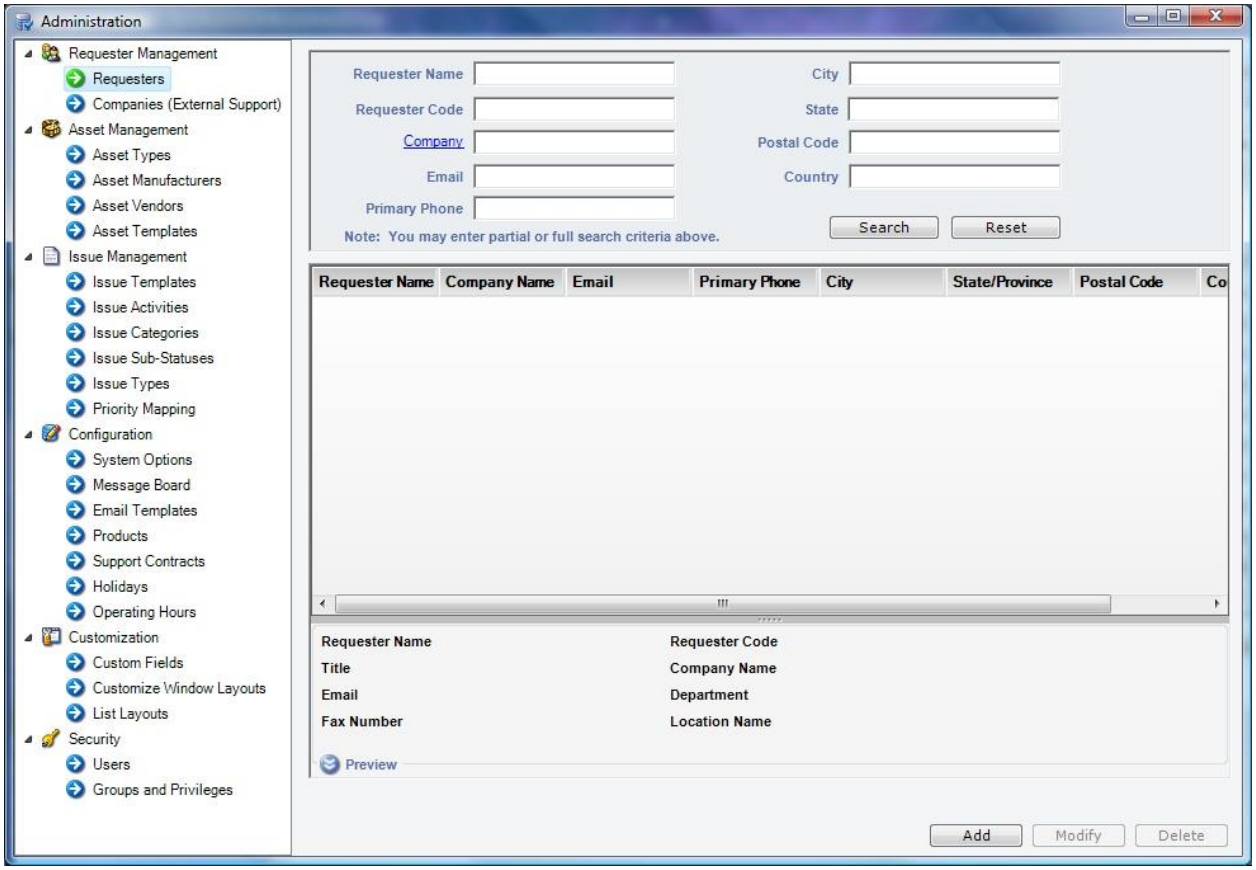
In this section, we will cover methods of searching for and creating a requester or company.

Requesters

Requester Management > Requesters

As described in the *Requesters* section of Chapter 2, requesters—formerly referred to as customers in previous versions of Help Desk Authority—are those individuals calling your help desk for assistance. These are the actual individuals who you will be dealing with every day through your help desk.

The Requesters screen in the Administration window is shown below.



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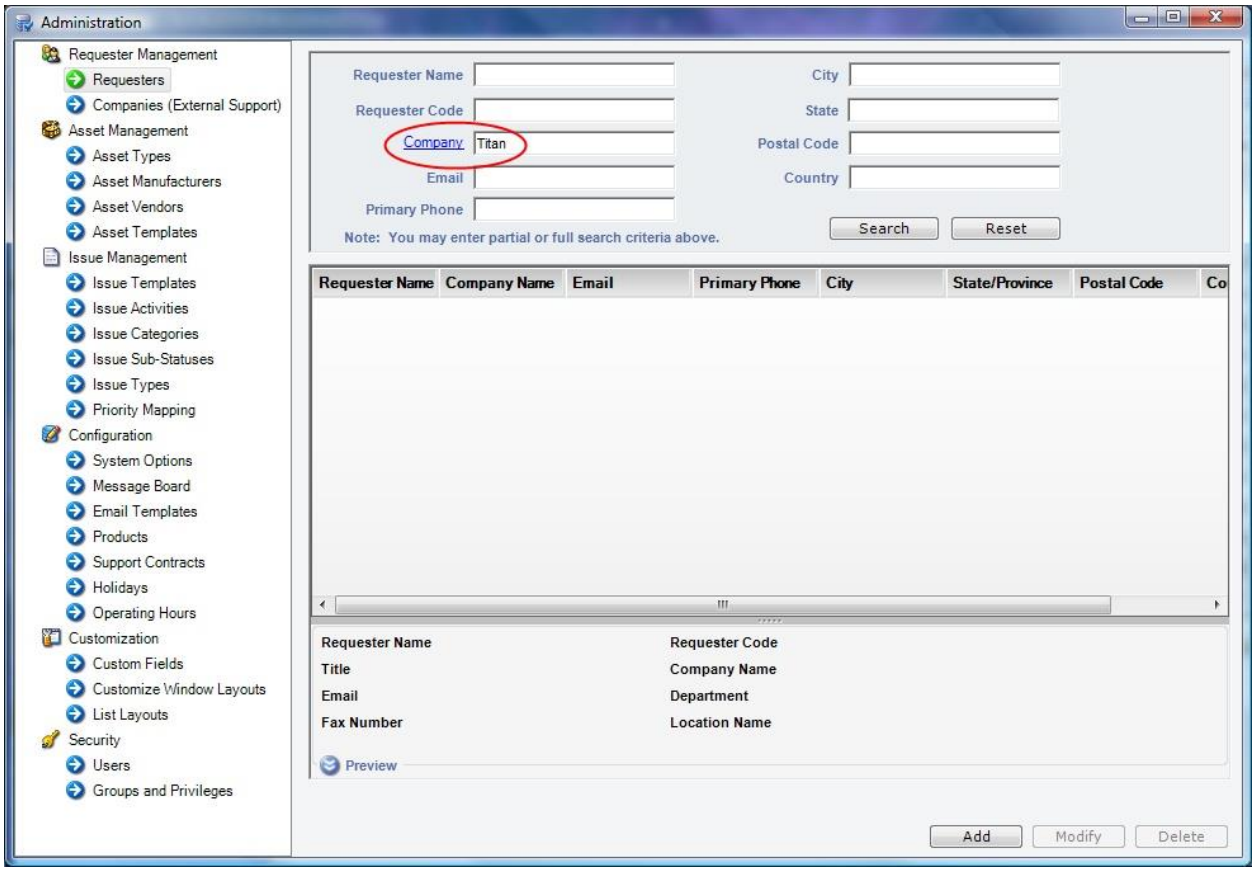
Searching for a Requester

There are several ways to search for a requester from the Requesters screen. You can search on a requester using any criterion listed below, or a combination of criteria to narrow your results if desired. The search section of the Requesters screen is shown below.

1. Enter any known values for the requester you are attempting to locate.
2. Click the **Search** button.
3. If you need to reset the form, use the **Reset** button at any time.

Example

In the Company field, Titan has been entered. After clicking the **Search** button, the results (all requesters connected to any company with “Titan” in the name) are visible in the results section of the window.



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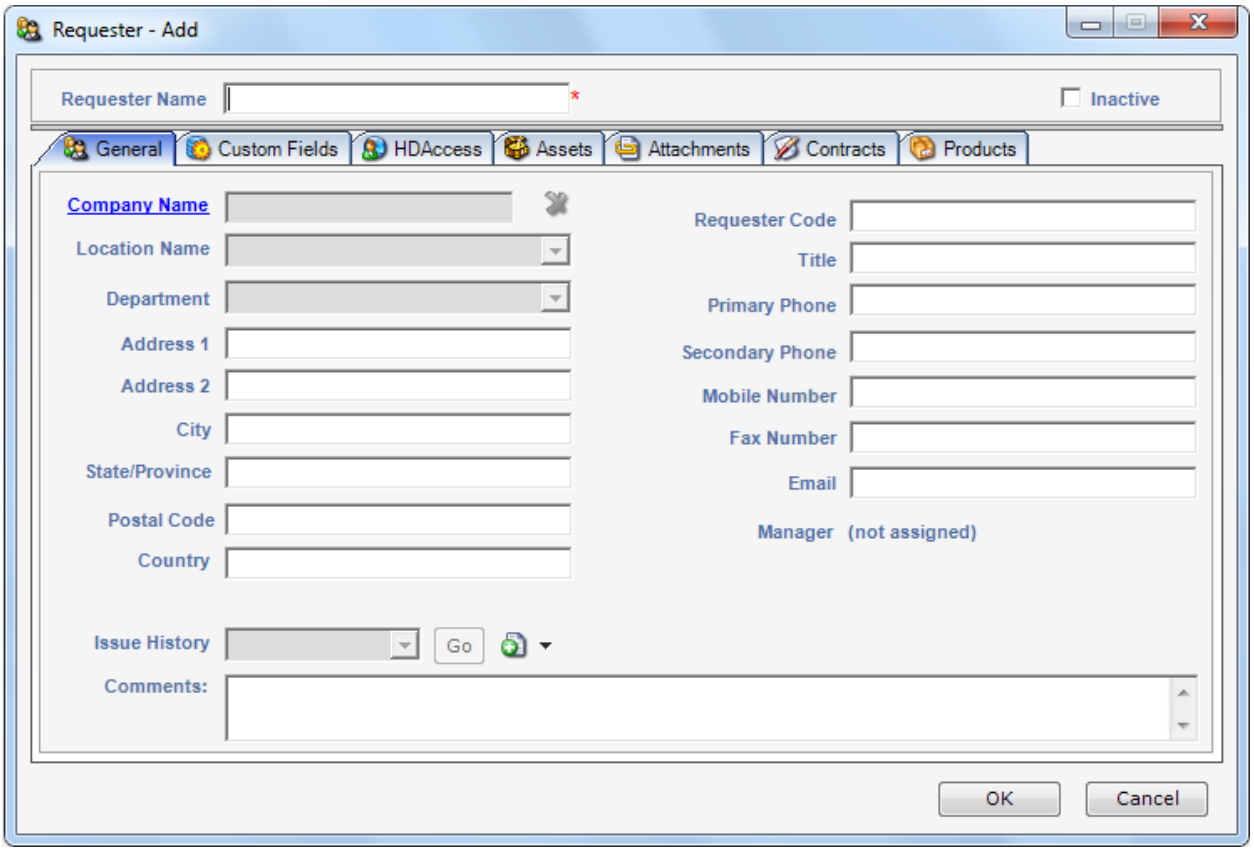
Creating a New Requester

If you need to create a new requester, you can do so from the Administration window in the Requesters screen. Simply click the **Add** button at the bottom of the window as shown below.

This will open the Requester – Add window as shown below. If a requester has been previously added, this window will appear exactly the same, but it will be called the Requester – Edit window.



The first tab in the Requester – Add window is the General tab. Above the tabs is the **Requester Name** field.

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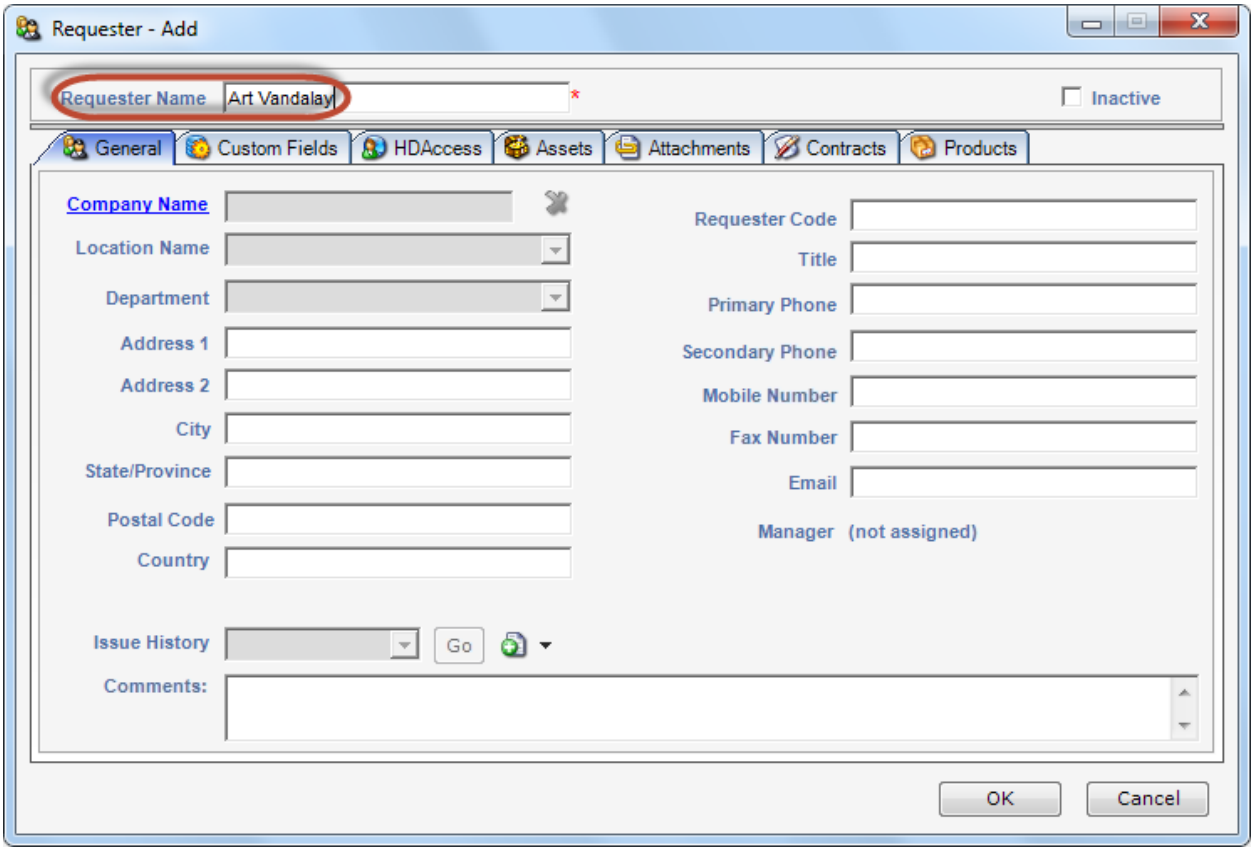
To add a new requester, follow the steps below.

1. Enter the name of the requester in the **Requester Name** field. This field is required.



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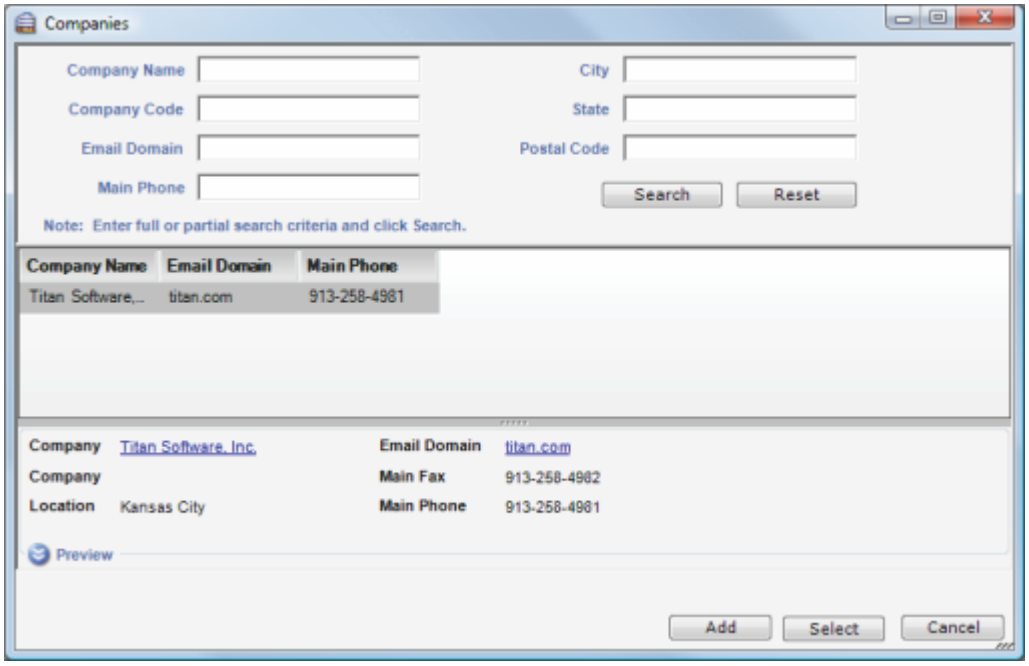
2. In the **Company Name** field, you can select a company or create a new one. To select an existing company, click the **Company Name** link. This will open the Companies window as shown below.



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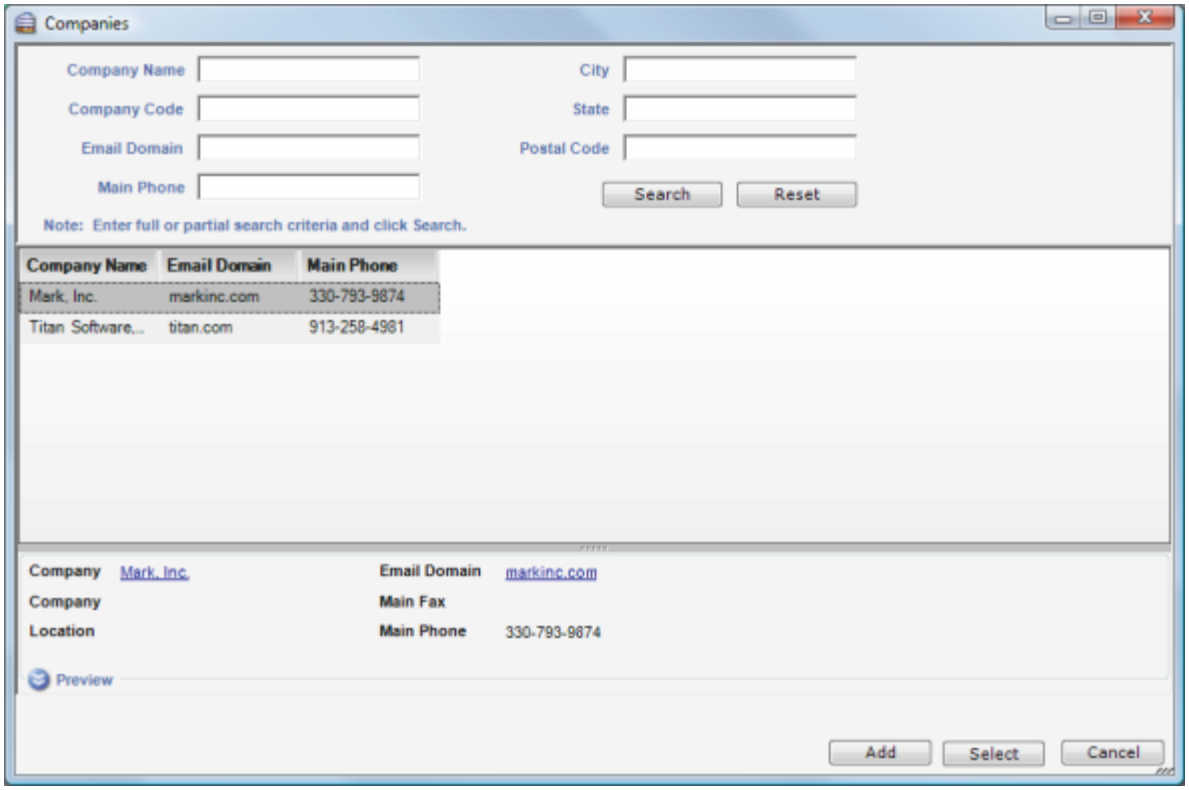
To select a company, you can search on several search criteria, or you can simply click the **Search** button for a complete list of available companies to attach to the new requester. In the example below, the **Search** button was clicked and the list of companies was presented.



From here, you can:

Select a company by highlighting the company name (by clicking it) and pressing the **Select** button.

OR

Create a new company by clicking the **[Click here to create a new Company]** link. This will open the Company – Add window where a new company can be created. See the next section, Companies, for full details on creating a new Company.

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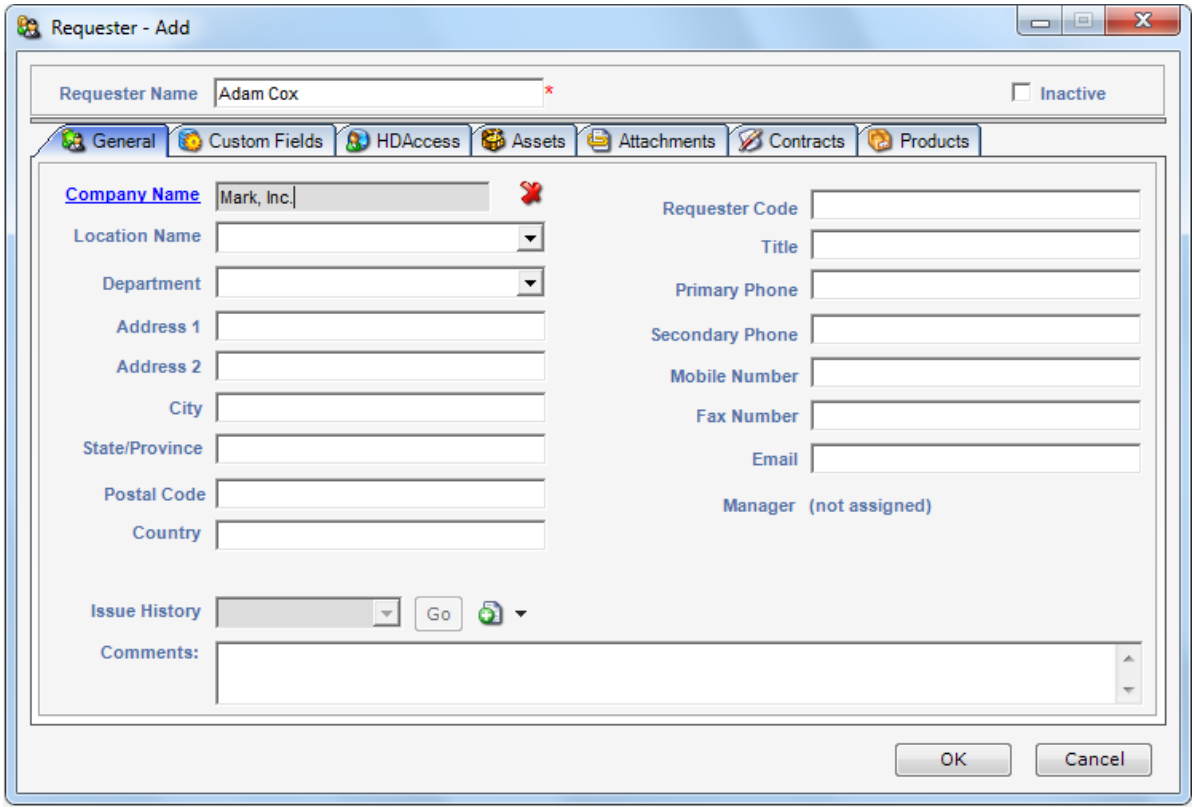
3. In our example, a new company, Mark, Inc., has been created. Click on the company name, then click the **Select** button.

The company will now be attached to the new requester, and the company information fields will be automatically populated with the existing company information as shown below. To clear the company information fields, click the .



4. Enter the location name in the **Location Name** field if it isn't already populated.
5. If the new requester is part of a company department, select the department name in the **Department** drop-down menu.
6. Enter the address in the **Address 1** and **Address 2** fields.
7. Enter the city name in the **City** field.
8. Enter the state or province in the **State/Province** field.
9. Enter the postal code in the **Postal Code** field.
10. Enter the country in the **Country** field.
11. Enter the requester code in the **Requester Code** field. The requester code should follow your organization's guidelines for requester codes if they are available.
12. Enter the title of the requester in the **Title** field. For example, "VP of Sales."
13. Enter the primary phone number in the **Primary Phone** field.
14. Enter the secondary phone number in the **Secondary Phone** field.
15. Enter the mobile phone number in the **Mobile Number** field.
16. Enter the fax number in the **Fax Number** field.
17. Enter the email address in the **Email** field.
18. The **Manager** field is retrieved from Active Directory and is only applicable for requesters synchronized from Active Directory.

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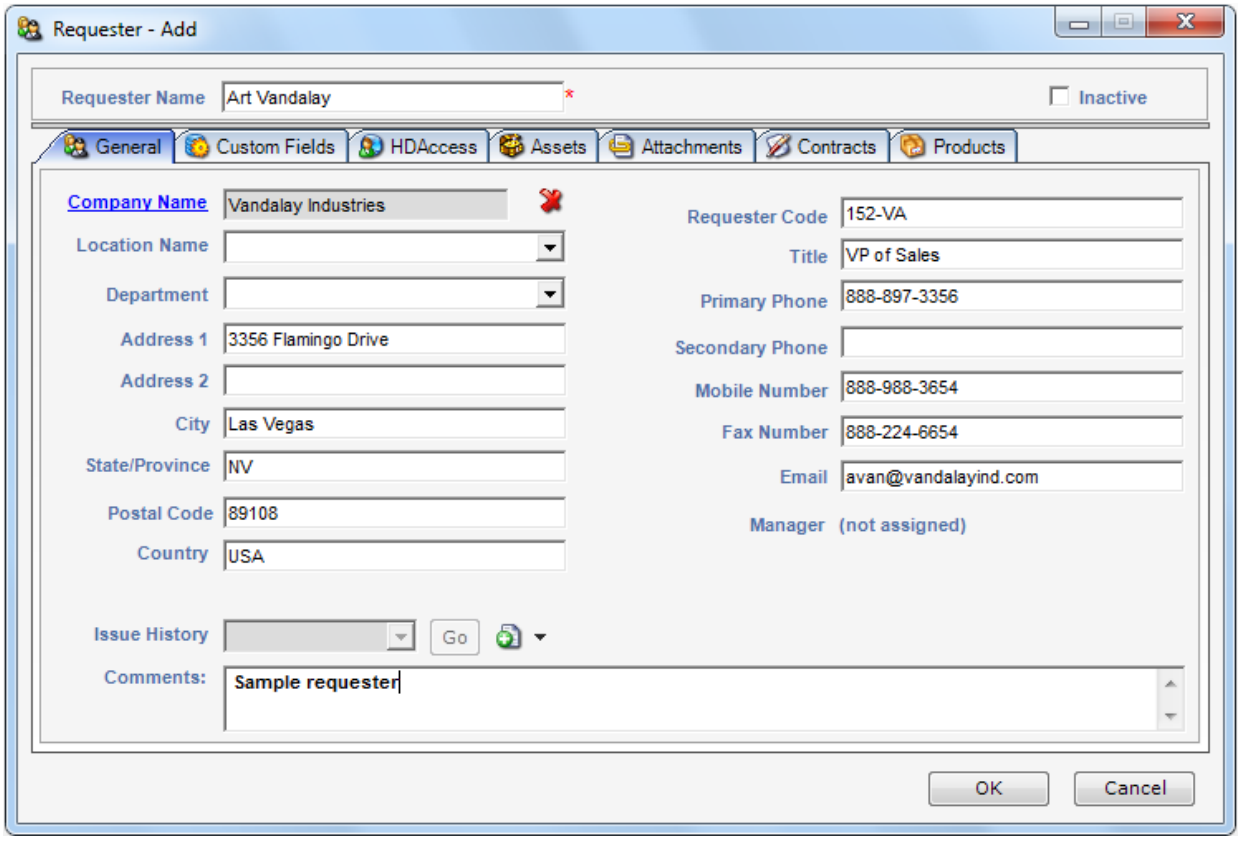
19. When creating a new requester, the **Issue History** drop-down is grayed out as there are no current or past issues with a new requester. This field can be ignored.
20. Enter any comments regarding the new requester in the **Comments** field.

A sample of a completed General tab is below.



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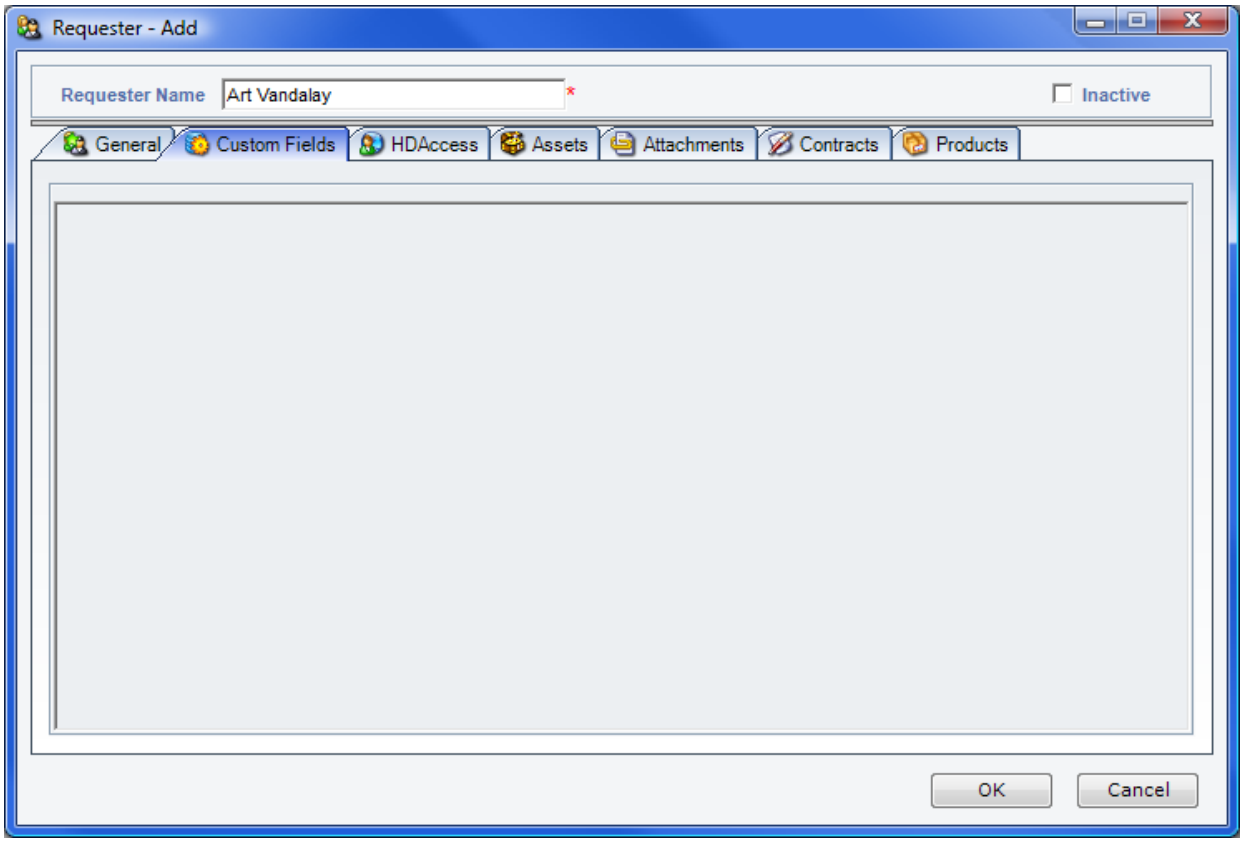
The next tab in the Requester – Add window is the Custom Fields tab. If you have created any custom fields for requesters, they will appear under this tab.



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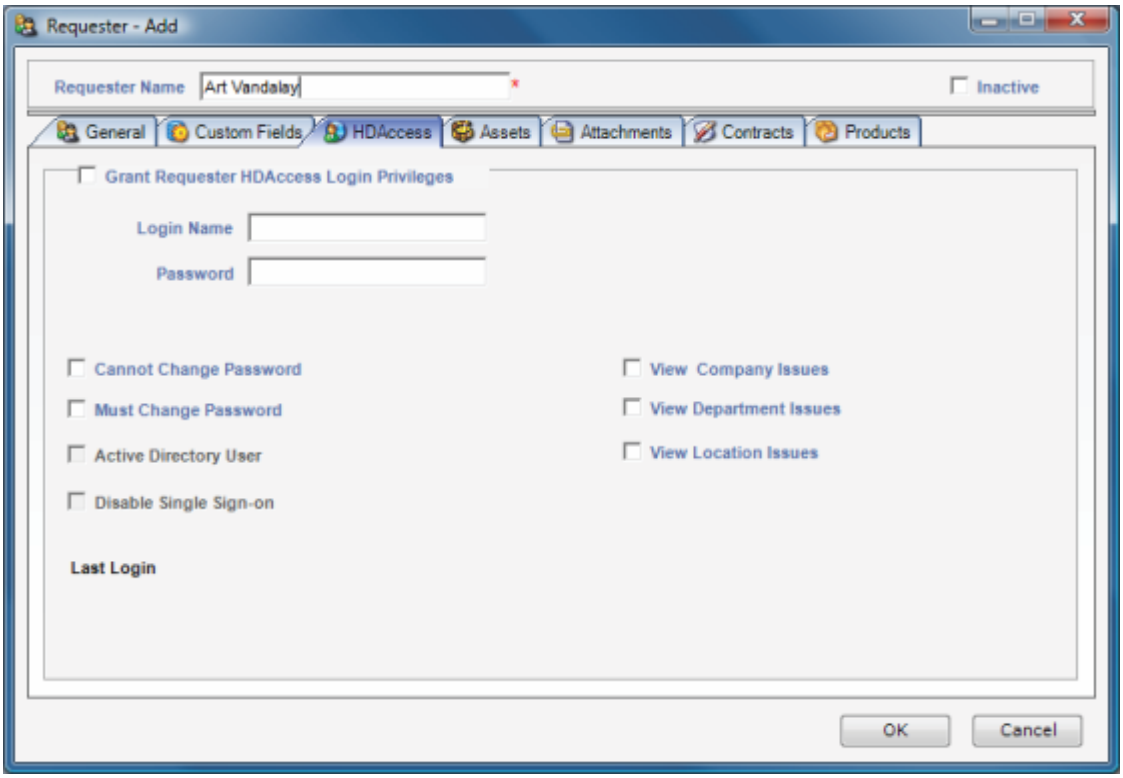
Following the Custom Fields tab is the HDAccess tab shown below. If you will be granting HDAccess login privileges to the new requester, take the following steps in this tab.



1. Click the **Grant Requester HDAccess Login Privileges** checkbox.
2. Enter the login name in the **Login Name** field.
3. Enter the password in the **Password** field.
4. If the changing of passwords will be handled by the Administrator and not the requester, check the **Cannot Change Password** checkbox.
5. If the requester will be required to change his password, check the **Must Change Password** checkbox.
6. If you want the requester to be able to view all company issues, check the **View Company Issues** checkbox.
7. If you want the requester to be able to view all department issues, check the **View Department Issues** checkbox.
8. If you want the requester to be able to view all location issues, check the **View Location Issues** checkbox.
9. If the new requester has been created using HDSync, the **Active Directory User** checkbox will automatically be checked. Otherwise, this field will always be unavailable.
10. If the Active Directory User checkbox is checked, the **Disable single sign-on** can be checked or unchecked depending upon Administrator preference regarding this requester's use of single sign-on. If the **Active Directory User** checkbox is not checked, this option will also be unavailable.
11. The **Last Login** field will be automatically populated with the last login date and time of the requester.

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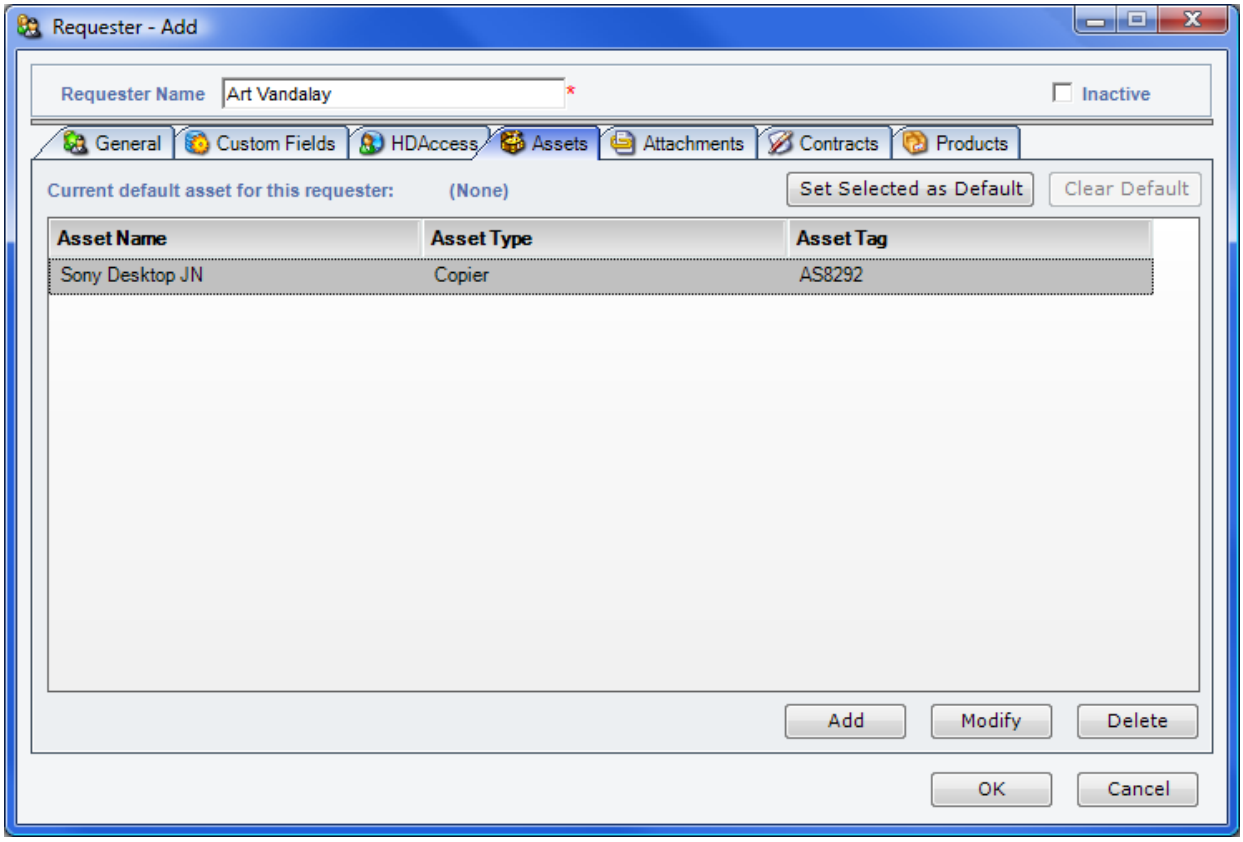
For our example, we will not be granting the requester access to HDAccess, so we will leave all fields blank, which is the default.

The Asset tab is the next tab in the Requester – Add window. This tab is where you will assign assets to an individual requester.



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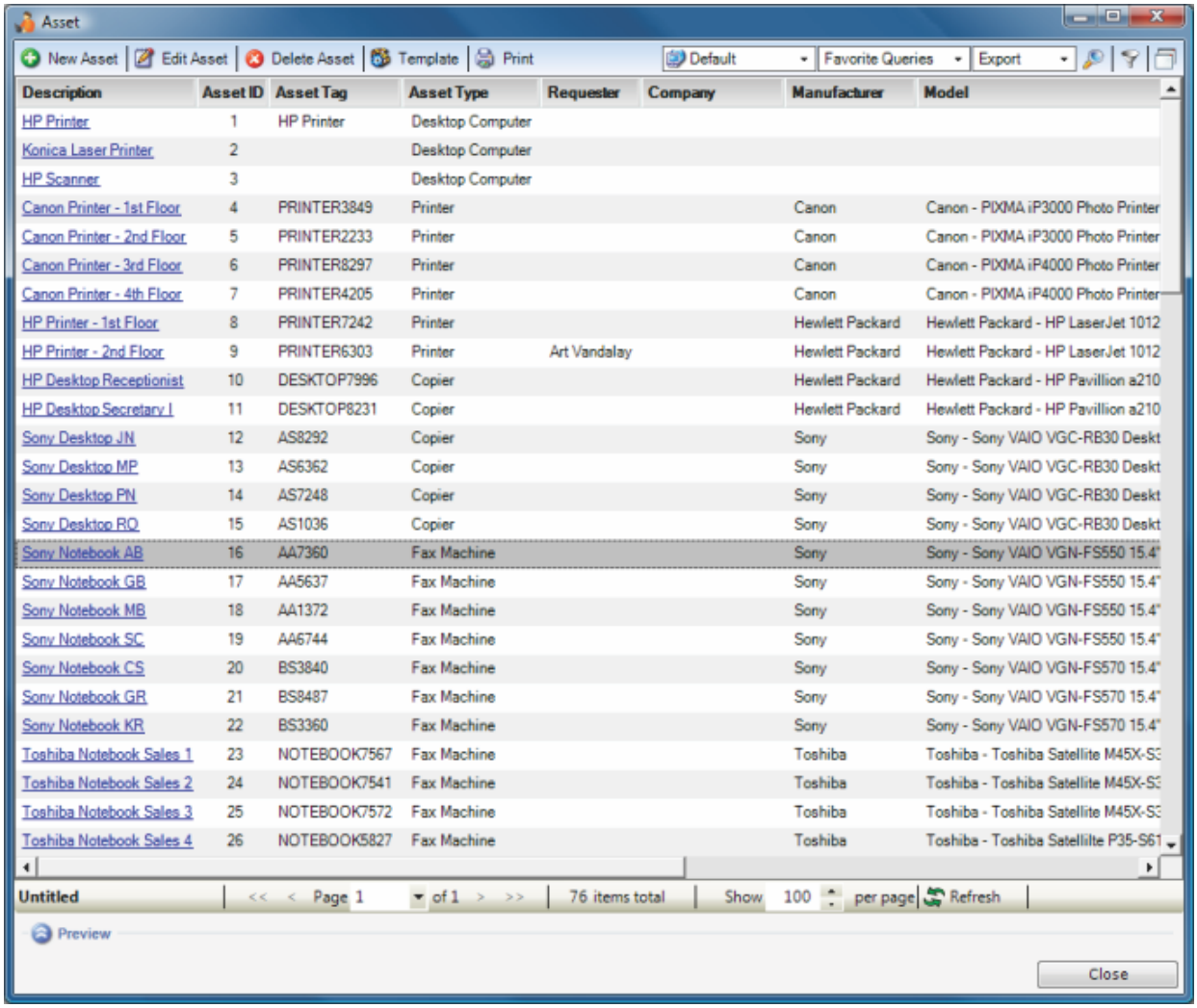
To add an asset or assets to a new requester:

1. Click the **Add** button. This will open the Assets window, providing a list of assets to choose from to add to the requester. If the new requester information has not yet been saved, you will be presented with the alert shown below, informing you that a save is required. Click the **OK** button. If this alert does not appear, proceed to step 2.


Asset
New Asset
Edit Asset
Delete Asset
Template
Print
Default
Favorite Queries
Export
Description
Asset ID
Asset Tag
Asset Type
Requester
Company
Manufacturer
Model
HP Printer 1 HP Printer Desktop Computer
Konica Laser Printer 2 Desktop Computer
HP Scanner 3 Desktop Computer
Canon Printer - 1st Floor 4 PRINTER3849 Printer Canon Canon - PIXMA iP3000 Photo Printer
Canon Printer - 2nd Floor 5 PRINTER2233 Printer Canon Canon - PIXMA iP3000 Photo Printer
Canon Printer - 3rd Floor 6 PRINTER8297 Printer Canon Canon - PIXMA iP4000 Photo Printer
Canon Printer - 4th Floor 7 PRINTER4205 Printer Canon Canon - PIXMA iP4000 Photo Printer
HP Printer - 1st Floor 8 PRINTER7242 Printer Hewlett Packard Hewlett Packard - HP LaserJet 1012
HP Printer - 2nd Floor 9 PRINTER6303 Printer Art Vandalay Hewlett Packard Hewlett Packard - HP LaserJet 1012
HP Desktop Receptionist 10 DESKTOP7996 Copier Hewlett Packard Hewlett Packard - HP Pavillion a210
HP Desktop Secretary I 11 DESKTOP8231 Copier Hewlett Packard Hewlett Packard - HP Pavillion a210
Sony Desktop JN 12 AS8292 Copier Sony Sony - Sony VAIO VGC-RB30 Deskt
Sony Desktop MP 13 AS6362 Copier Sony Sony - Sony VAIO VGC-RB30 Deskt
Sony Desktop PN 14 AS7248 Copier Sony Sony - Sony VAIO VGC-RB30 Deskt
Sony Desktop RQ 15 AS1036 Copier Sony Sony - Sony VAIO VGC-RB30 Deskt
Sony Notebook AB 16 AA7360 Fax Machine Sony Sony - Sony VAIO VGN-FS550 15.4"
Sony Notebook GB 17 AA5637 Fax Machine Sony Sony - Sony VAIO VGN-FS550 15.4"
Sony Notebook MB 18 AA1372 Fax Machine Sony Sony - Sony VAIO VGN-FS550 15.4"
Sony Notebook SC 19 AA6744 Fax Machine Sony Sony - Sony VAIO VGN-FS550 15.4"
Sony Notebook CS 20 BS3840 Fax Machine Sony Sony - Sony VAIO VGN-FS570 15.4"
Sony Notebook GR 21 BS8487 Fax Machine Sony Sony - Sony VAIO VGN-FS570 15.4"
Sony Notebook KR 22 BS3360 Fax Machine Sony Sony - Sony VAIO VGN-FS570 15.4"
Toshiba Notebook Sales 1 23 NOTEBOOK7567 Fax Machine Toshiba Toshiba - Toshiba Satellite M45X-S3
Toshiba Notebook Sales 2 24 NOTEBOOK7541 Fax Machine Toshiba Toshiba - Toshiba Satellite M45X-S3
Toshiba Notebook Sales 3 25 NOTEBOOK7572 Fax Machine Toshiba Toshiba - Toshiba Satellite M45X-S3
Toshiba Notebook Sales 4 26 NOTEBOOK5827 Fax Machine Toshiba Toshiba - Toshiba Satellite P35-S61
Untitled
Page 1 of 1
76 items total
Show 100 per page
Refresh
Preview
Close

2. Click the asset name on the asset you wish to add to the requester.
3. The asset will now appear in the asset list under the Asset tab of the requester.

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The next tab in the Requester – Add window is the Attachments tab. If you would like to attach any files to a requester, follow the steps outlined below.

1. If you would like to browse your system for a file to attach, click the **Attach File** button. This will open up a Windows Explorer window. Simply browse to the file you wish to attach, then click the **Open** button. The attached file will appear in the pane below the **Attach** buttons. In our example, an image file has been added as shown below.

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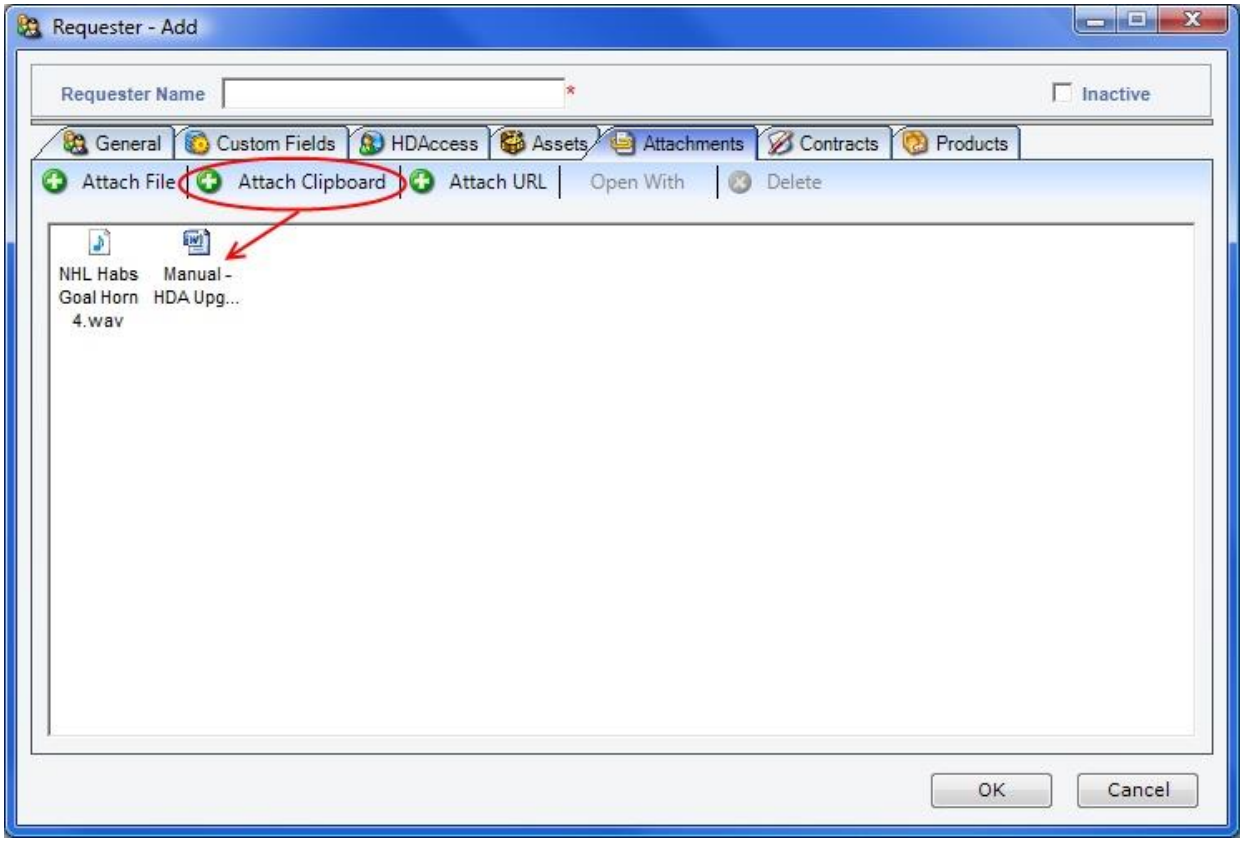
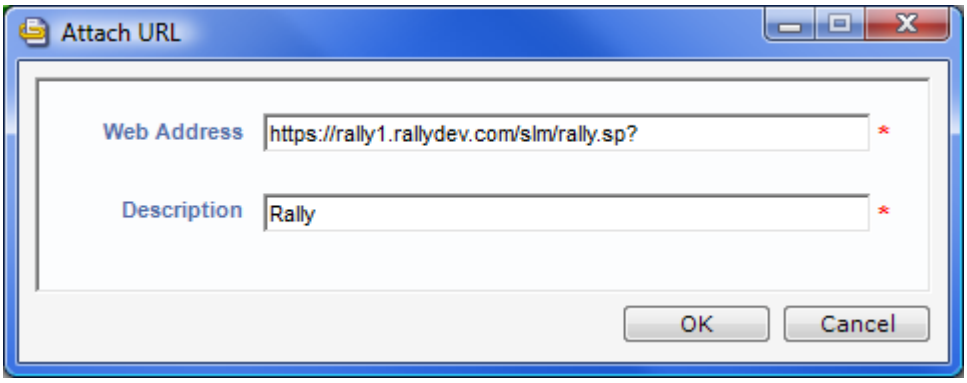
2. If you would like to attach a file that is currently on your clipboard, click the **Attach Clipboard** button. In our example, a Word document from the clipboard has been attached to this requester.



3. If you would like to attach a URL (website address) to a requester, click the **Attach URL** button. This will open the Attach URL window shown below. Enter the web address in the **Web Address** field and the description in the **Description** field. (Both fields are required.)



4. Click the **OK** button.

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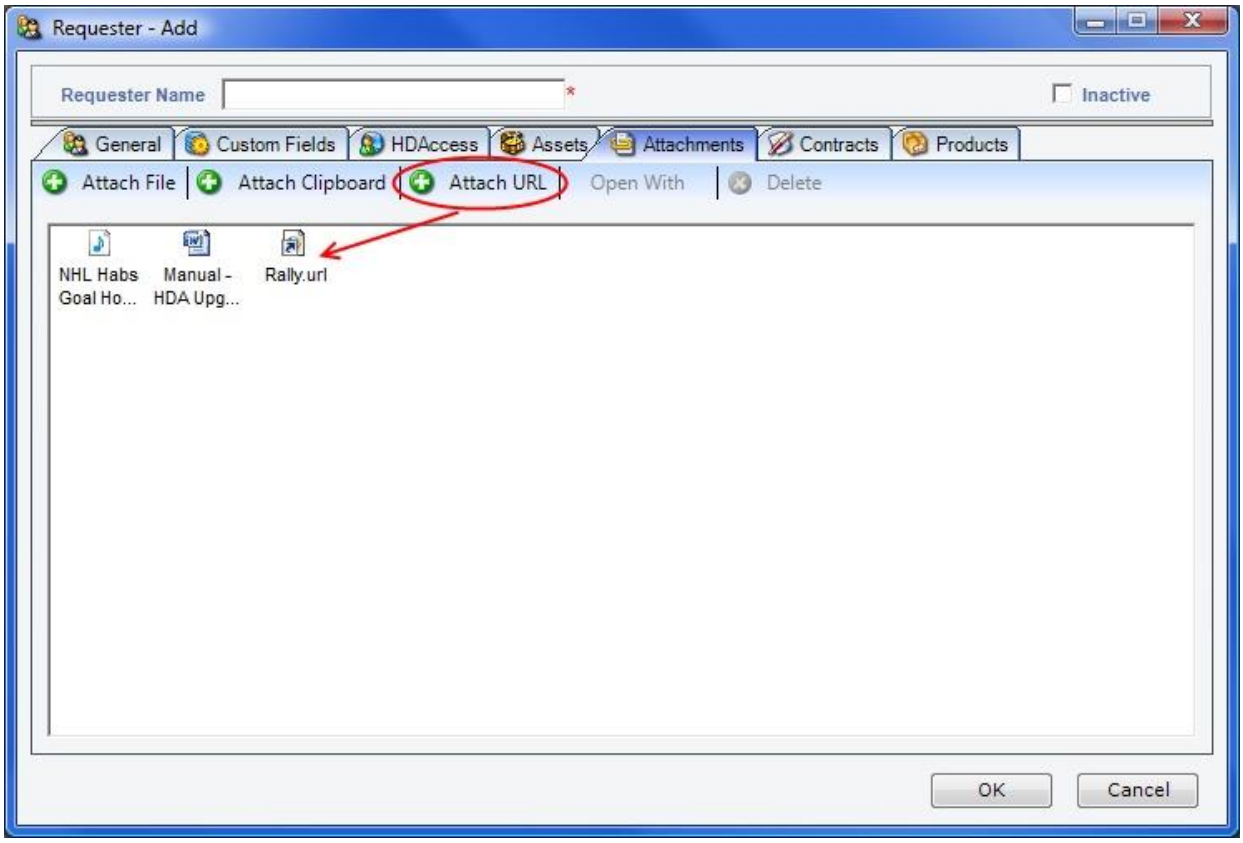
In our example, a URL for Help Desk Authority on the Quest website has been added as shown below.



5. Added attachments can be viewed by selecting the attachment and clicking the **Open With** button, or by simply double-clicking the attachment.
6. Added attachments can also be deleted by selecting the attachment and clicking the **Delete** button.

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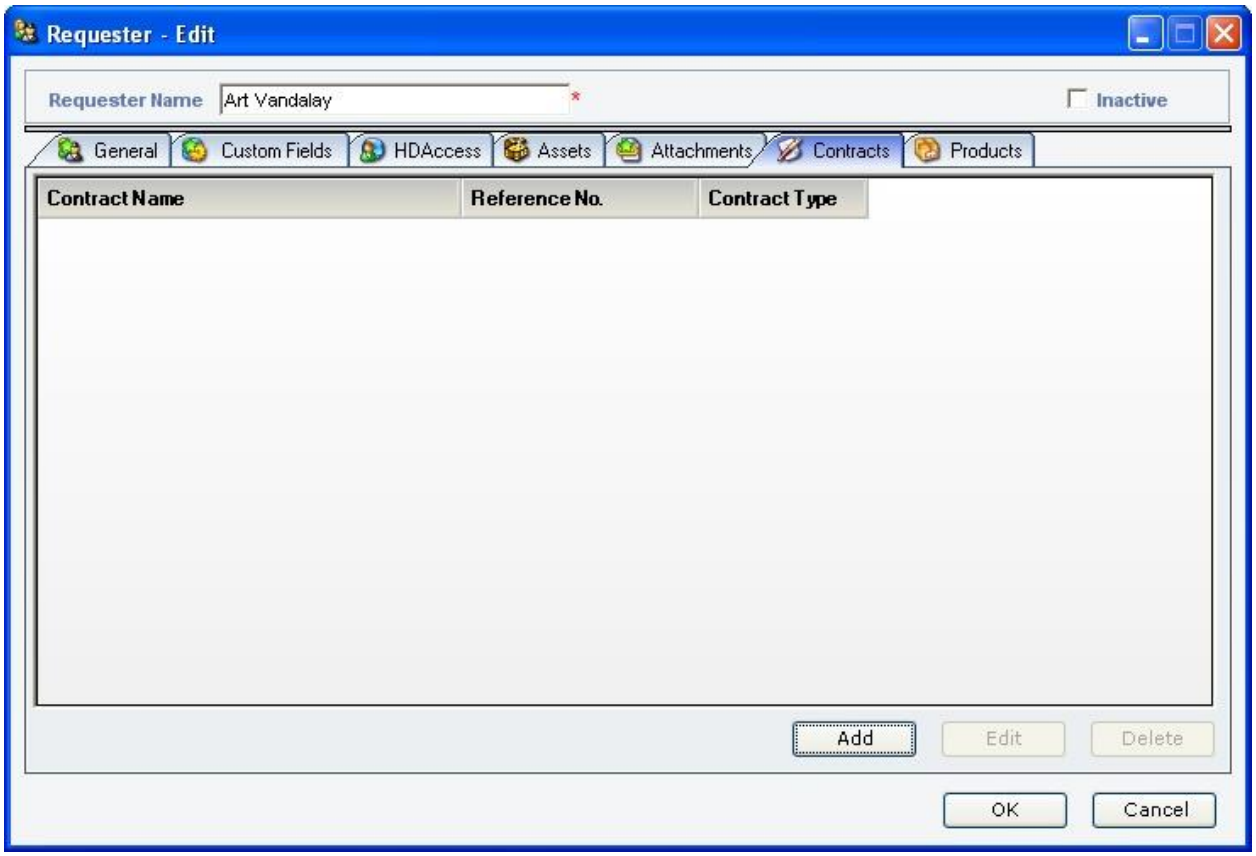
The next tab in the Requester – Add window is the Contracts tab. From here you can associate a specific contract to the new requester,



To associate a contract to a requester:

1. Click the **Add** button. This will open the Requester Contract – Add window.
2. Under the General tab, select the contract you wish to assign to the requester from the **Contract List** drop-down menu.
3. Enter the reference number in the **Reference No** field if necessary.
4. Add any comments in the **Comments** field
5. The **Start Date** and **End Date** fields will be automatically populated if the contract is based upon duration. If you are using another type of contract, and you wish to include start and end dates, select both dates from the **Start Date** and **End Date** drop-down menus.
6. If you wish to link any products to the contract, click on the Linked Products tab of the Requester Contract – Add window. Available products will be listed in the **Available Products** selection list. Use the arrow keys to add or remove products to the **Products Linked to this Contract** selection list on the right.
7. If desired, this contract can be linked to the requester but not activated. If you would like to deactivate the contract (but retain the link to the requester), check the **Inactive** checkbox.
8. Click the **OK** button when finished.

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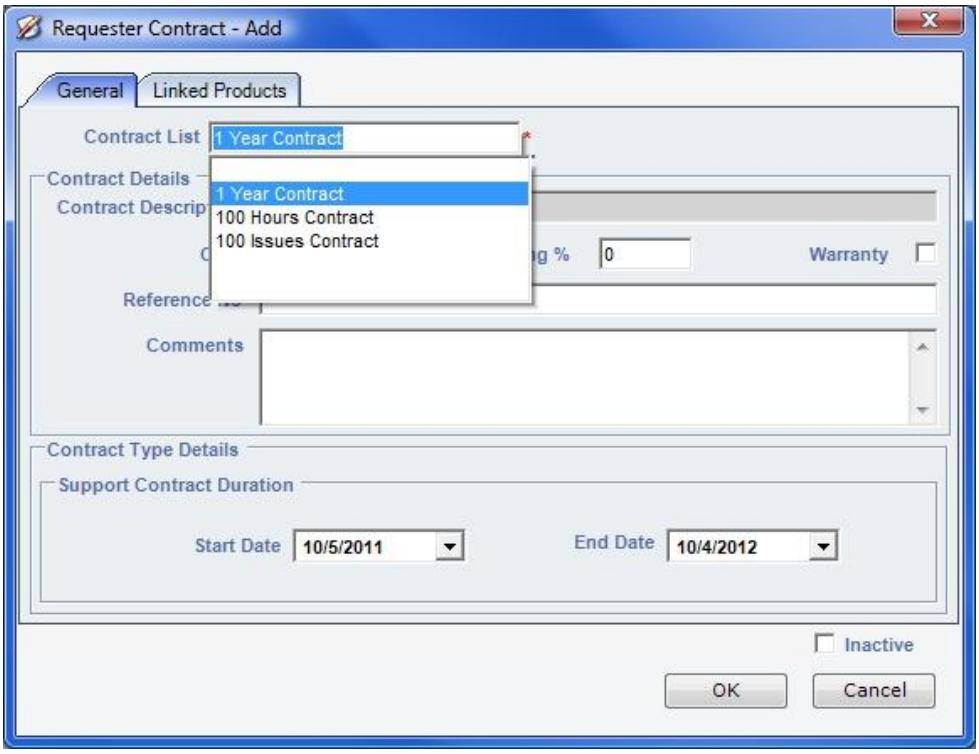
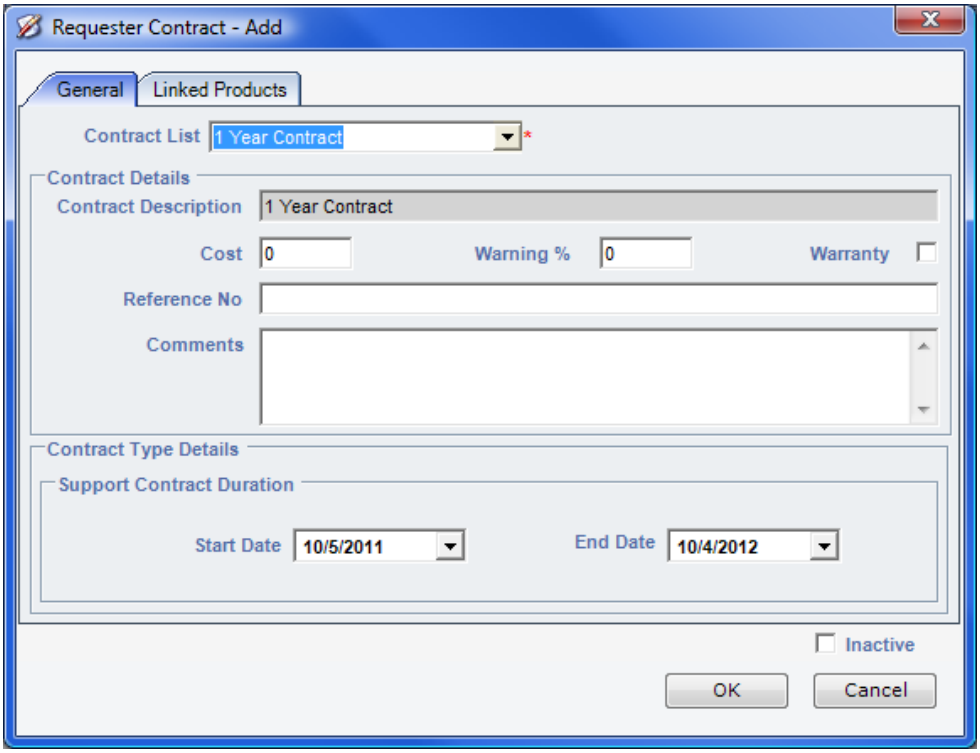
An example is shown below.





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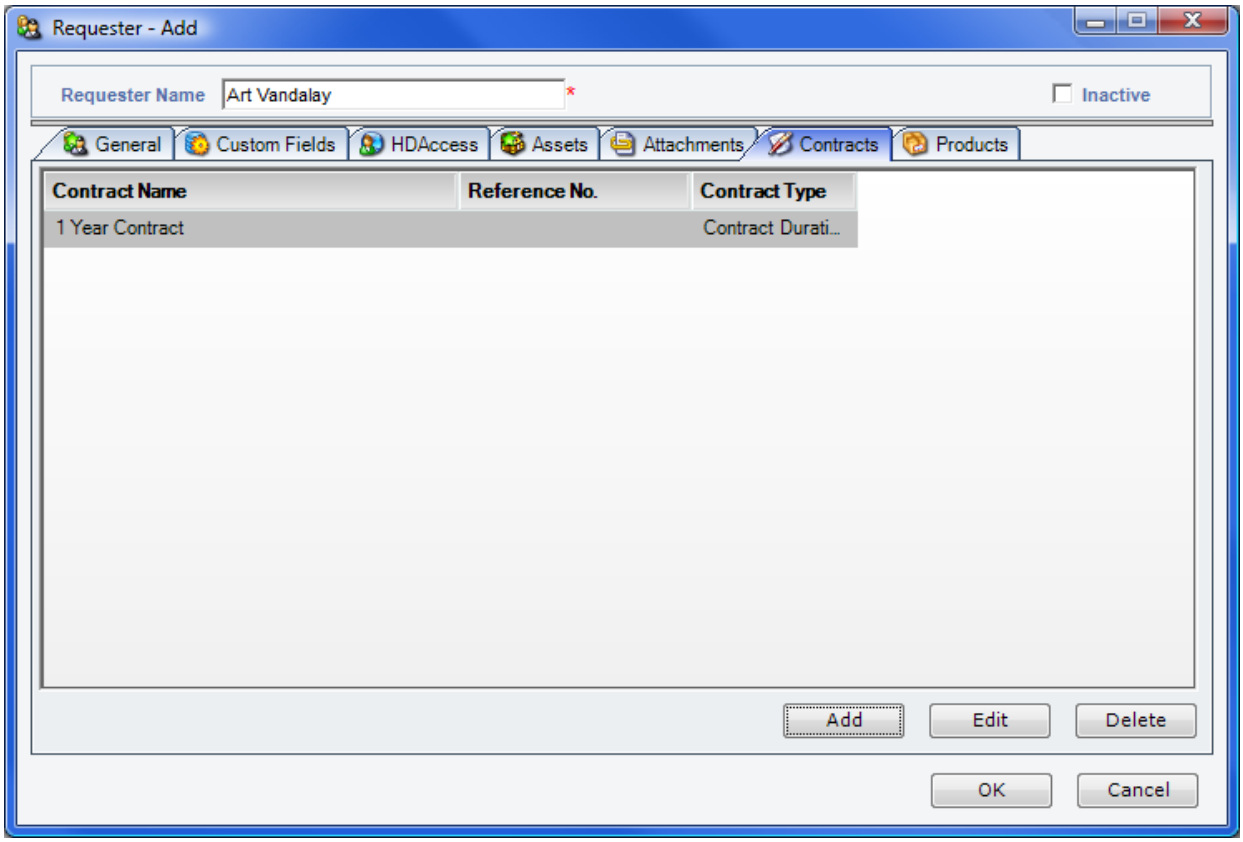
Once a contract has been linked to a requester, the contract name will appear in the contract list as shown below.



Once a contract is linked to a requester, it can be edited or deleted using the **Edit** or **Delete** buttons.

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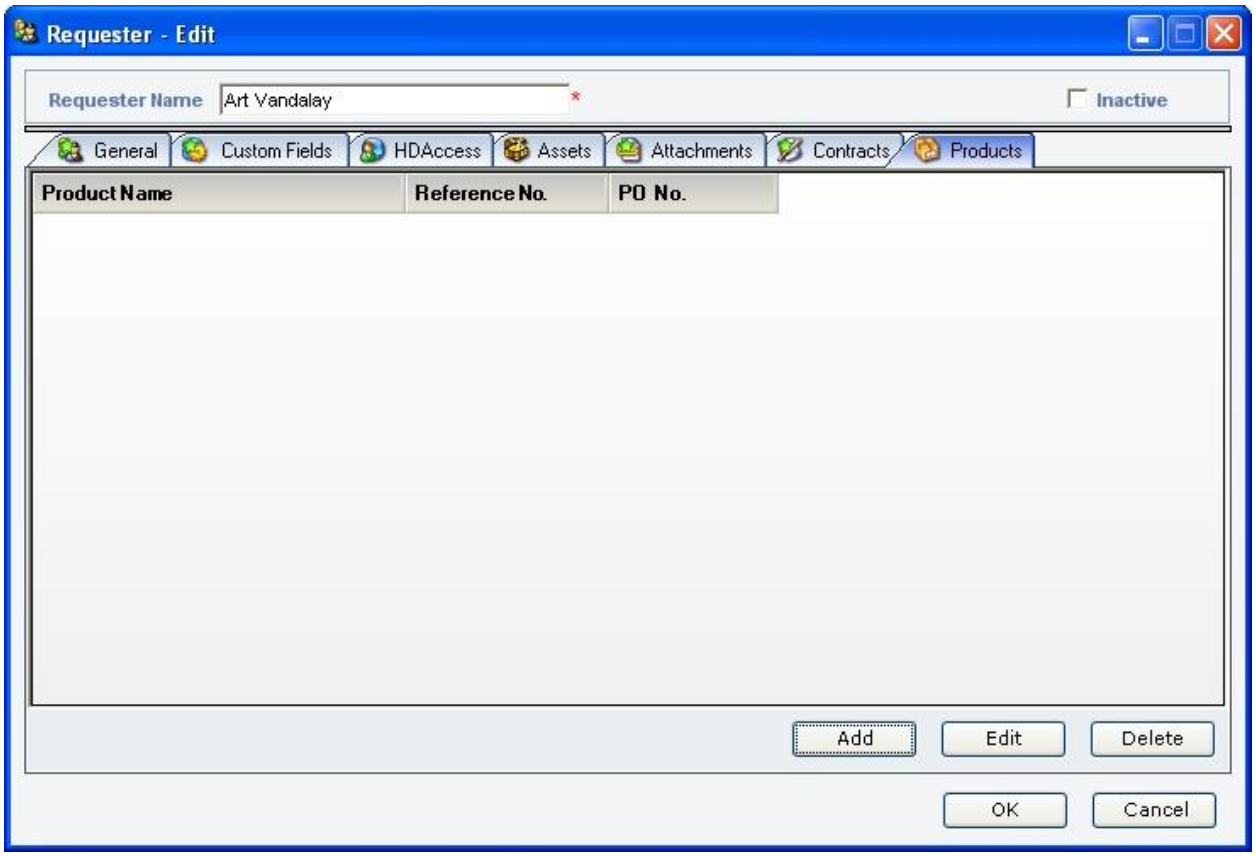
The final tab in the Requester – Add window is the Products tab. From this tab, you can add products to a requester. The Products tab is shown below.



To add a product to a requester:

1. Click the **Add** button. This will open the Requester Product – Add window.

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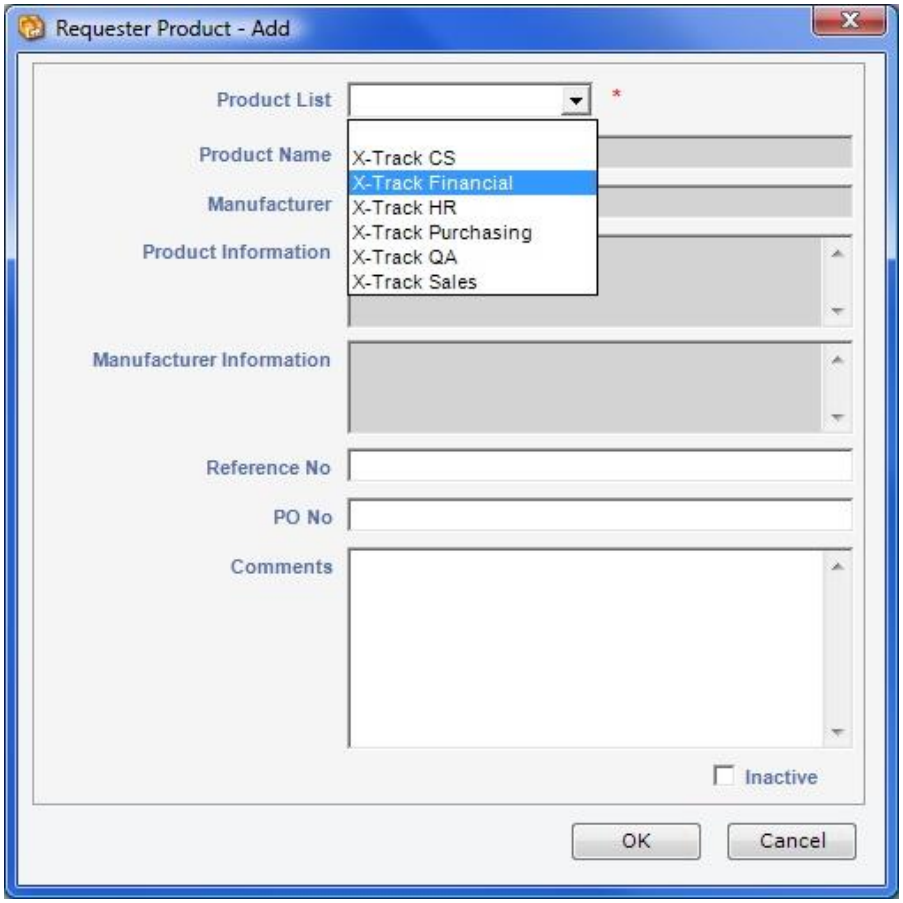
2. Select a product from the **Product List** drop-down menu as shown below (required).



3. The **Product Name**, **Manufacturer**, **Product information**, and **Manufacturer Information** fields will be automatically populated with the product data.
4. Enter a reference number in the **Reference No** field if needed.
5. Enter a purchase order number in the **PO No** field if needed.
6. Enter any comments in the **Comments** field.

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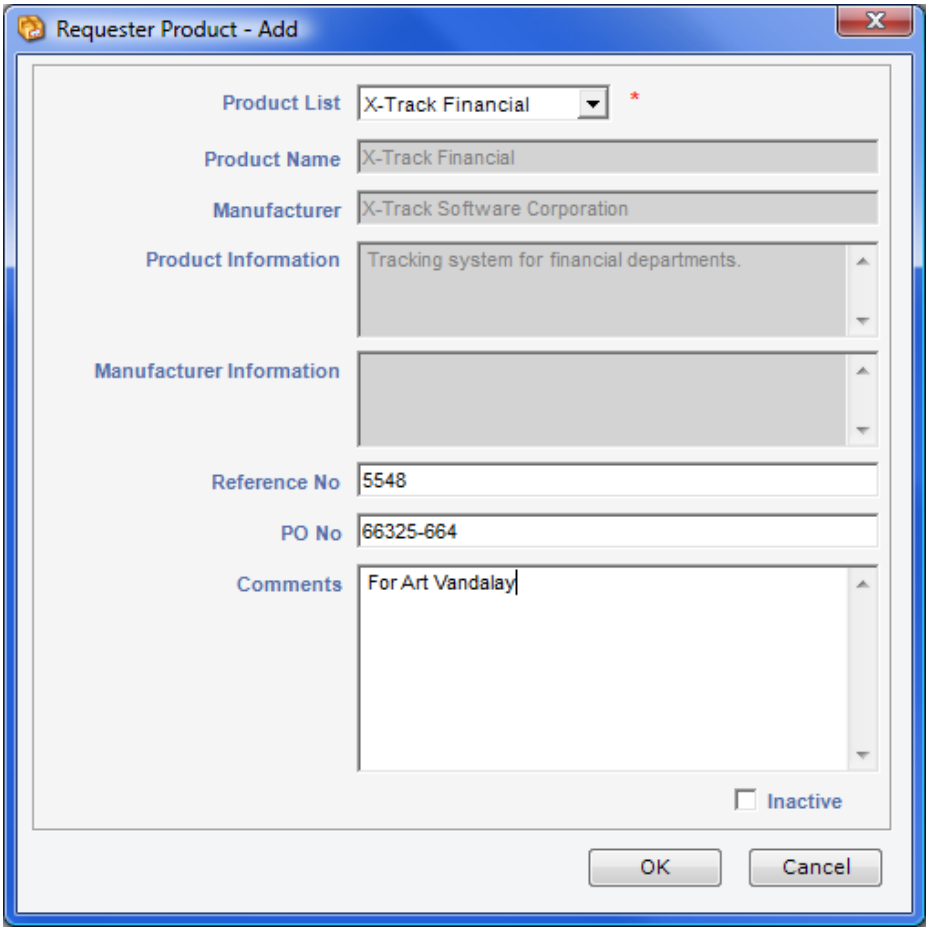
7. Click the **OK** button when finished. An example is below.



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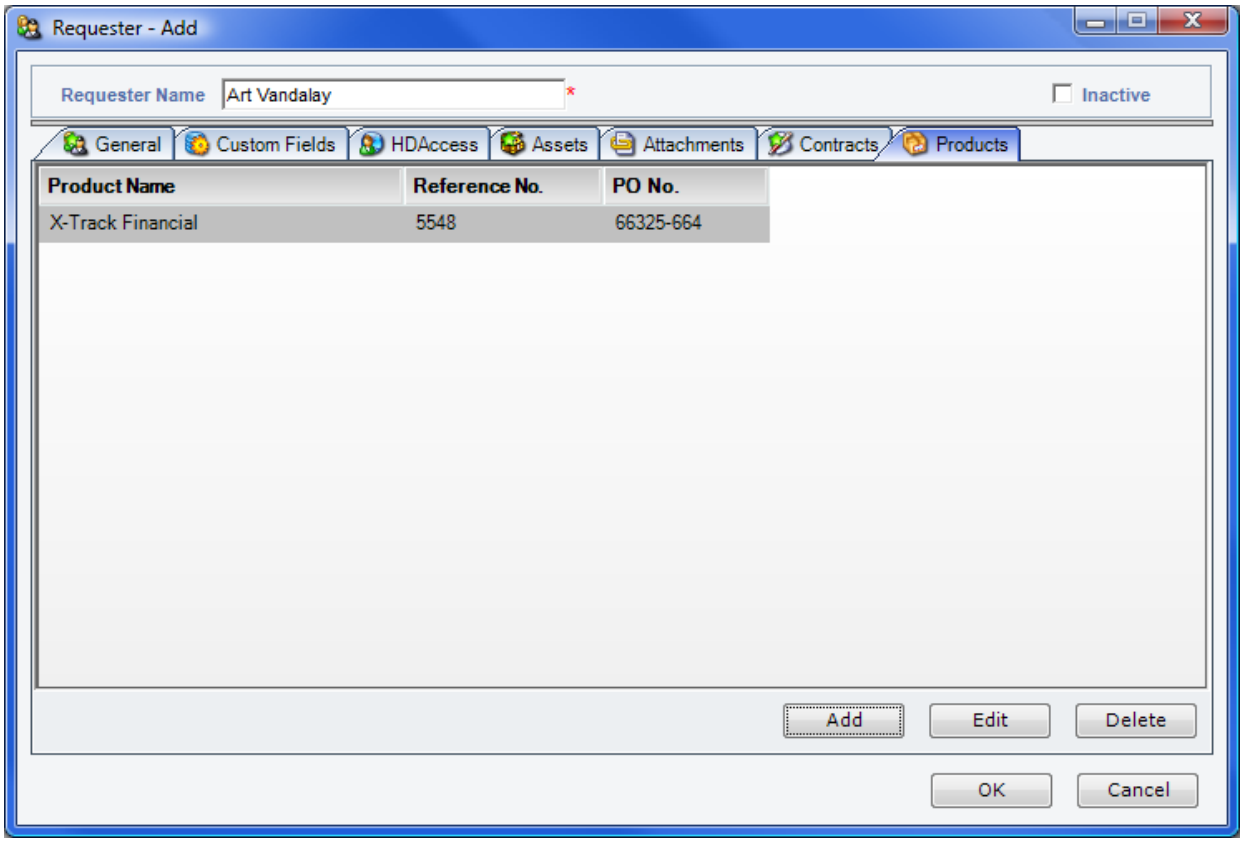
After a product has been linked to a requester, the product will appear in the list on the Products tab as shown below.



A product in the list can be edited or deleted by selecting the product then using the **Edit** button (opens the Requester Product – Edit window) or the **Delete** button.

To finish setting up a new requester:

8. Decide if the requester will initially be active or inactive. If inactive, check the **Inactive** checkbox to the left of the **Requester Name** field. Otherwise, leave the box unchecked.
9. The new requester will appear in the requester list on the main screen of the Administration window when **Requesters** is selected in the navigation pane.
10. Requesters can be modified or deleted at any time by using the **Modify** and **Delete** buttons located at the bottom of the window.

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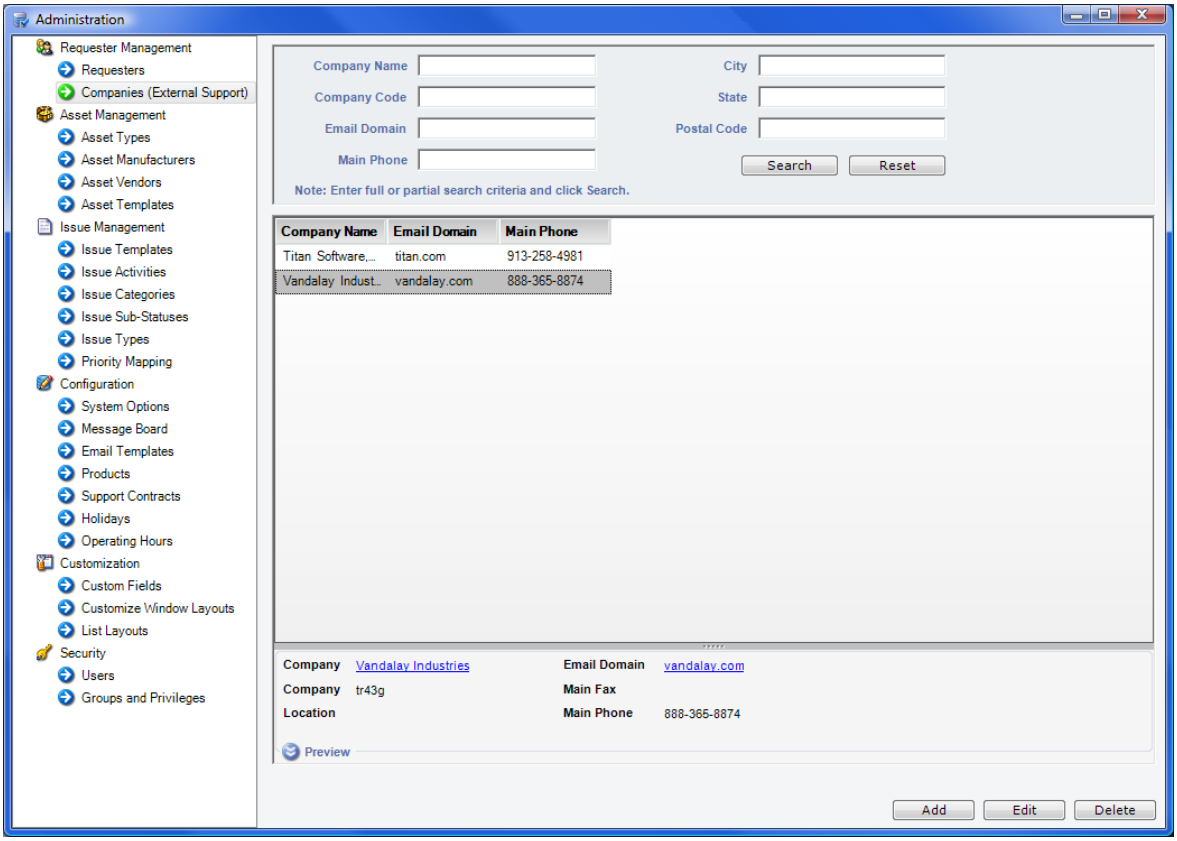
Companies

Requester Management > Companies

In Help Desk Authority, companies are the entities that employ your requesters. Not all requesters may be affiliated with a company, but when they are, you can capture pertinent company information that can be linked to your requester records.

Although the only required information about a company is its name, the more information you enter, the better Help Desk Authority will be able to provide a complete profile when you need it.

The Company screen of the Administration window is shown below.



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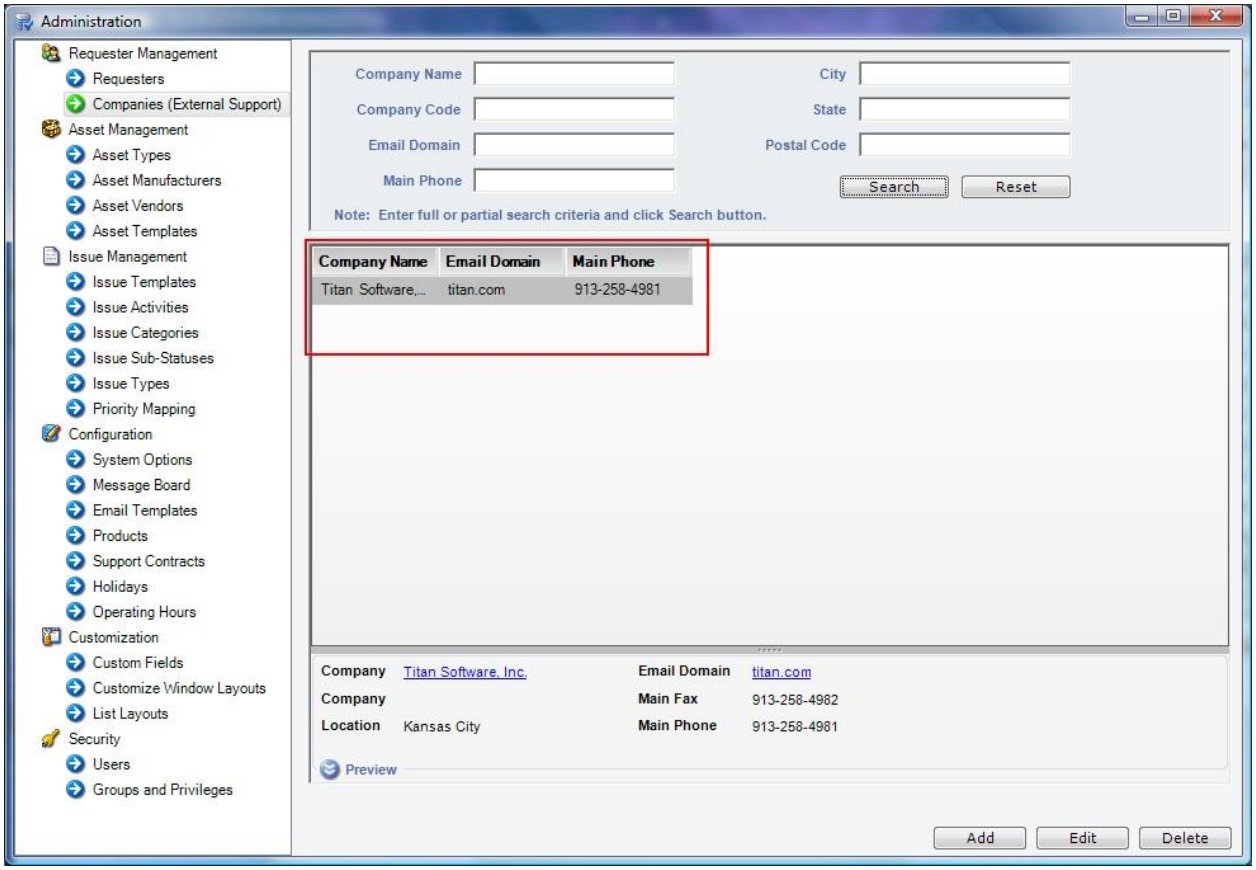
Searching for a Company

There are several ways to search for a company from the Companies screen. You can search on a company using any criterion listed below, or a combination of criteria to narrow your results if desired. The search section of the Company screen is shown below.

1. Enter any known values for the company you are attempting to locate.
2. Click the **Search** button.
3. If you need to reset the form, use the **Reset** button at any time.

Example

Although you can search for a company using any of the available criterion, it is not necessary to enter any data at all. To attain a list of all available companies, simply click the **Search** button. The entire list of available companies will be presented in the search results window as shown below.



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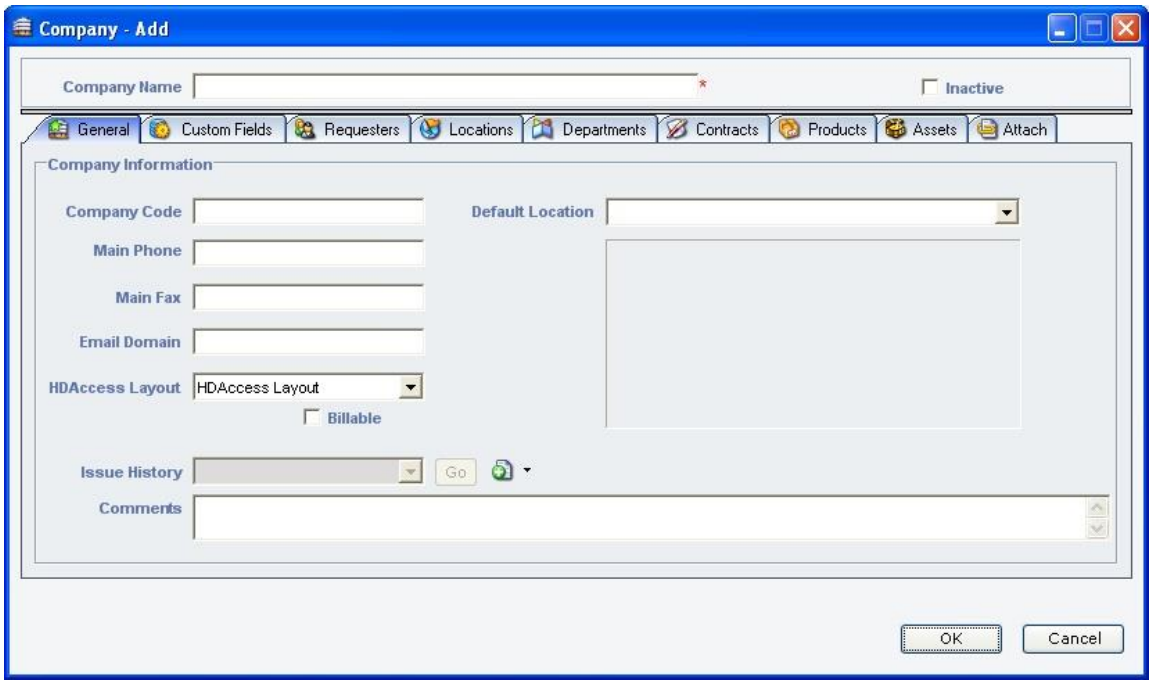
Creating a New Company

If you need to create a new company, you can do so from the Administration window in the Companies screen. Simply click the **Add** button.

This will open the Company – Add window as shown below. If a company has been previously added, this window will appear exactly the same, but it will be called the Company – Edit window.



The first tab in the Company – Add window is the General tab. The C**ompany Name** field is located above the 9 tabs.

To add a new company, follow the steps below.

1. Enter the name of the new company in the **Company Name** field (required).
2. If you would like the new company to be inactive initially, check the **Inactive** checkbox.
3. Enter the company code in the **Company Code** field. The company code should follow your organization's guidelines for company codes if they are available.
4. Enter the main phone number in the **Main Phone** field.
5. Enter the main fax number in the **Main Fax** field.
6. Enter the email domain in the **Email Domain** field.
7. If you have previously set up an HDAccess layout that you would like to use for this new company, select it from the **HDAccess Layout** drop-down menu.
8. Select the default location from the **Default Location** drop-down menu if there is more than one location associated with this new company. Locations are added in the Locations tab. If you add a location when adding a new company, you can go back to the General tab and select a default location. By default, this field is blank.
9. When creating a *new* company, the **Issue History** drop-down is grayed out as there are no current or past issues with a new company. This field can be ignored.
10. Enter any comments regarding the new company in the **Comment** field.

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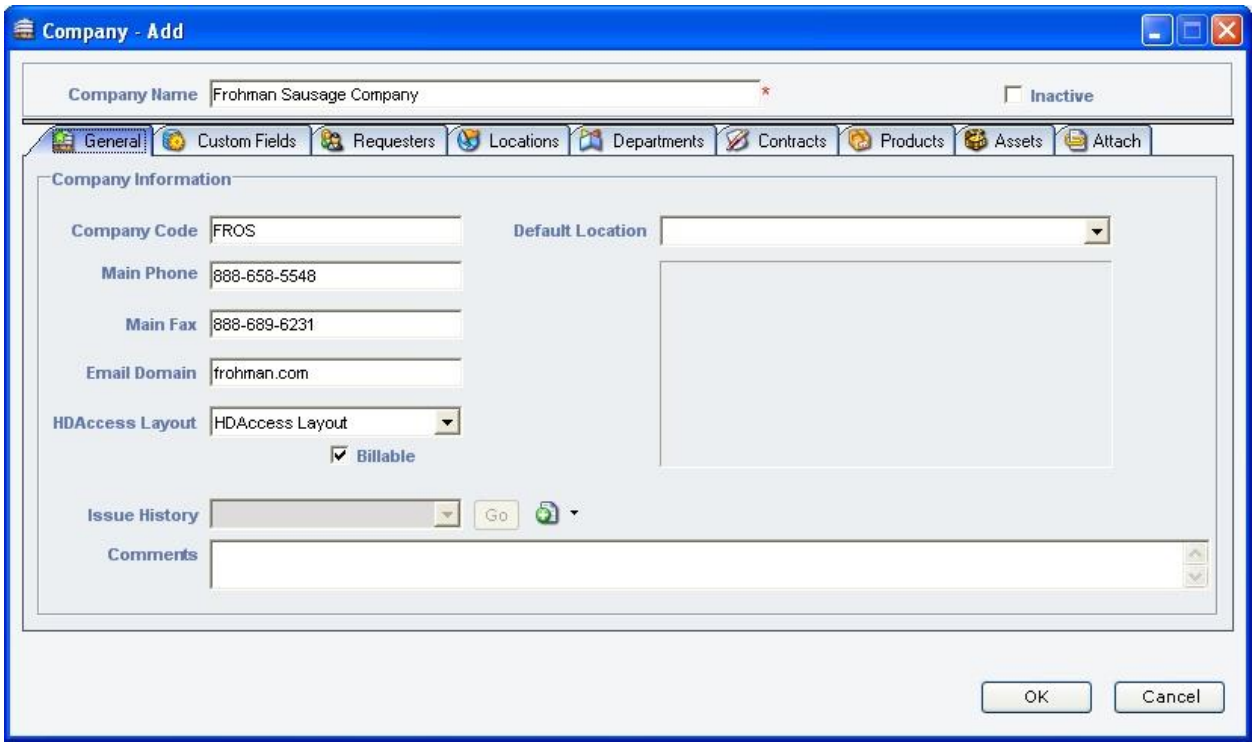
A sample of the completed General tab is shown below.



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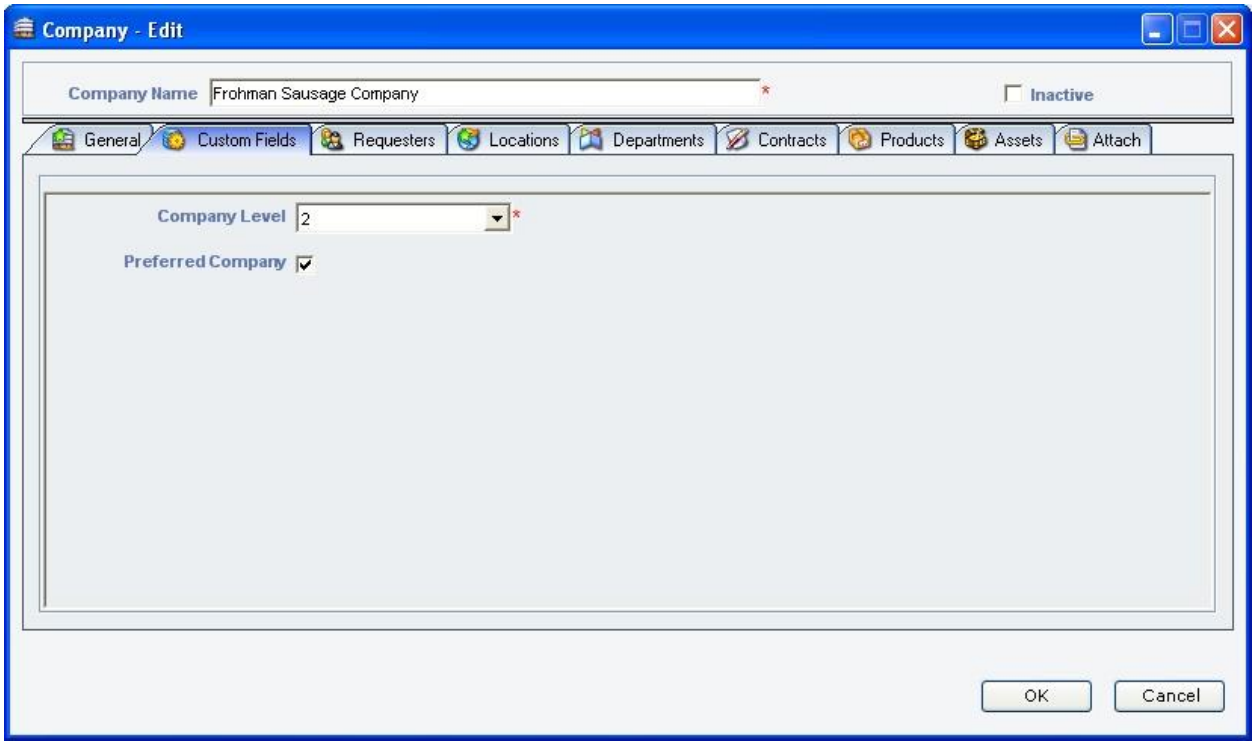
The next tab in the Company – Add window is the Custom Fields tab. If you have created any custom fields for companies, they will appear under this tab. In the example below, a custom field called Company Level is presented as a required field. The default value is “1”. Another custom field is a checkbox called Preferred Company, which has been checked. We will cover more on creating custom fields in the Customization section of this chapter.



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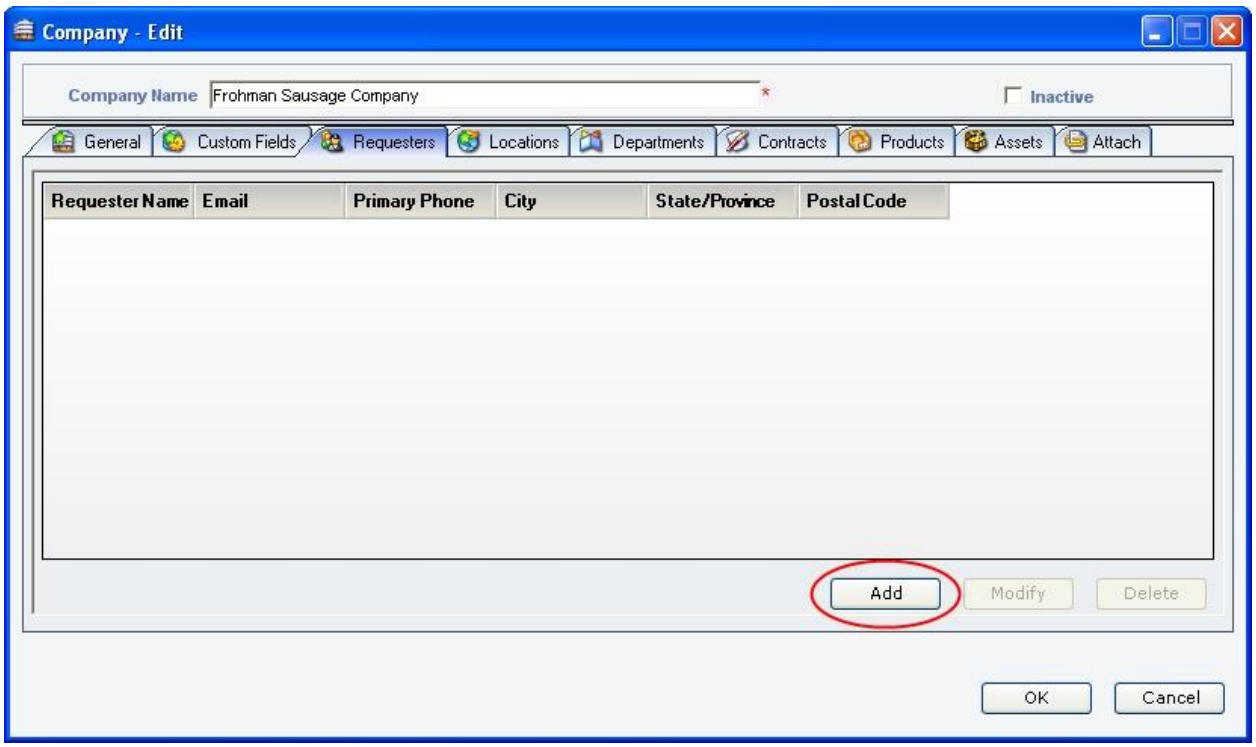
The next tab in the Company – Add window is the Requesters tab. Similar to the company's tab in the Requester – Add window, this tab is where you will link requesters to a company.

By default, no requesters are listed. They must be added. To add a requester to be linked to the new company, click the **Add** button.



Clicking the **Add** button opens the Requester – Add window that you are already familiar with. Adding a requester from this window is very similar to the basic add requester procedure. Simply complete the fields as outlined in the *Creating a New Requester* section previously covered, then click the **OK** button.

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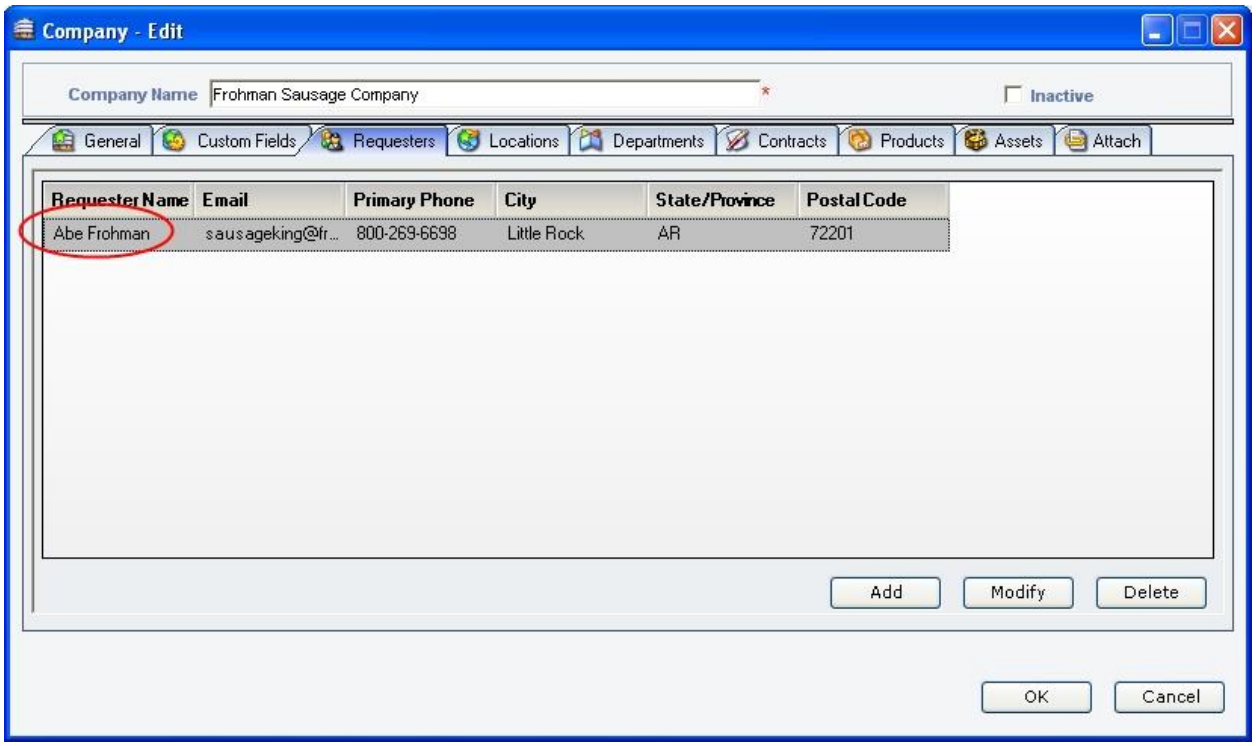
As shown below, a single requester is found in the Requesters tab. This requester is now linked to the new company.



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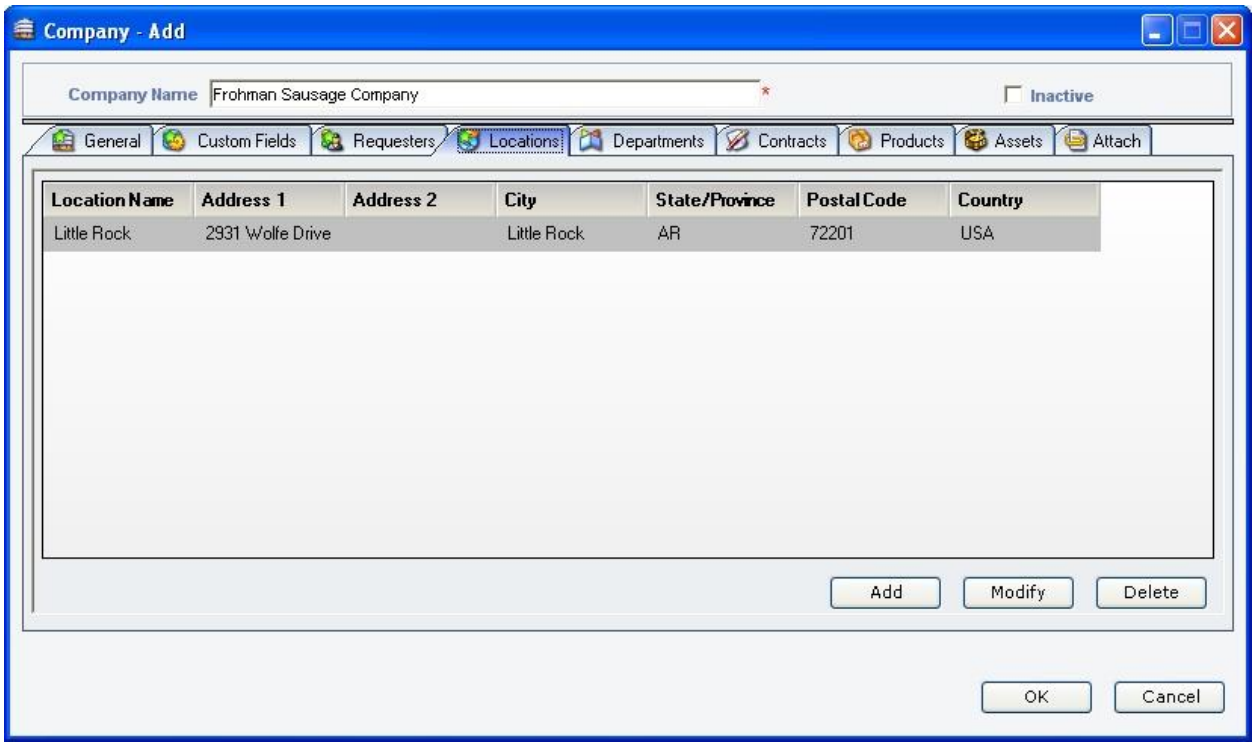
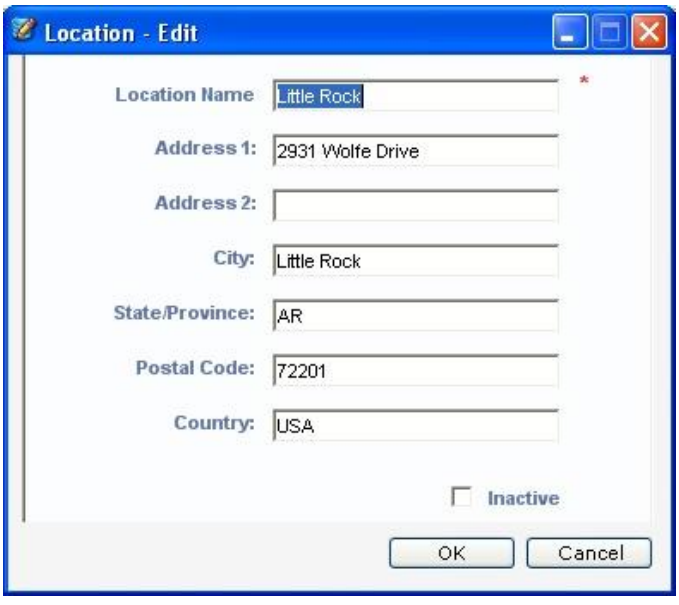
The next tab in the Company – Add window is the Locations tab. Here, you can add, edit and delete company locations. We will cover each of these activities. In our example below, there is one location.



First, we will modify the location by clicking the **Modify** Button. This opens the Location – Edit window.



After the location has been edited, click the **OK** button.

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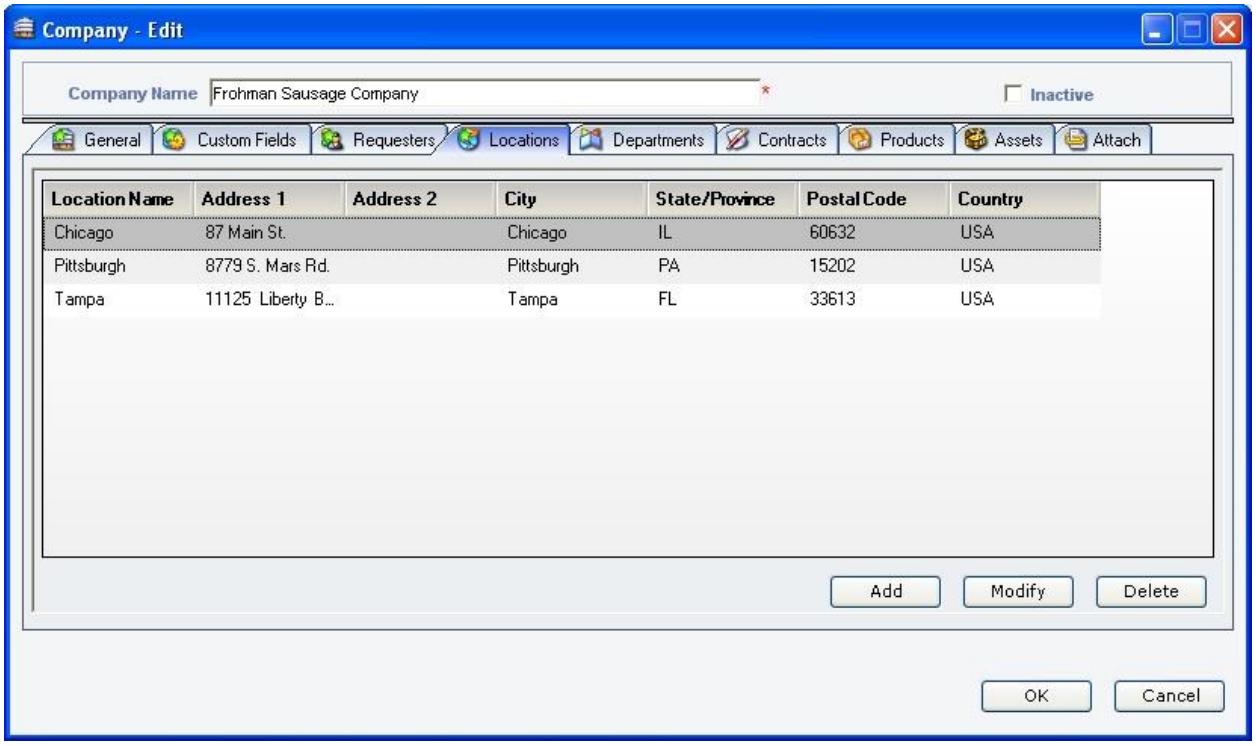
Next, we will click the **Add** button, and the Location – Add window opens. The Location – Add window is exactly like the Location – Edit window. After adding a new location, click the **OK** button. In our example, two additional locations have been added. Now three locations appear in the Location list on the Locations tab.



Next, we will delete a location. To do this, simply click on a location to highlight it, then click the **Delet**e button. A “Confirm Deletion of Location” alert opens. Click the **OK** button. The location has now been deleted.

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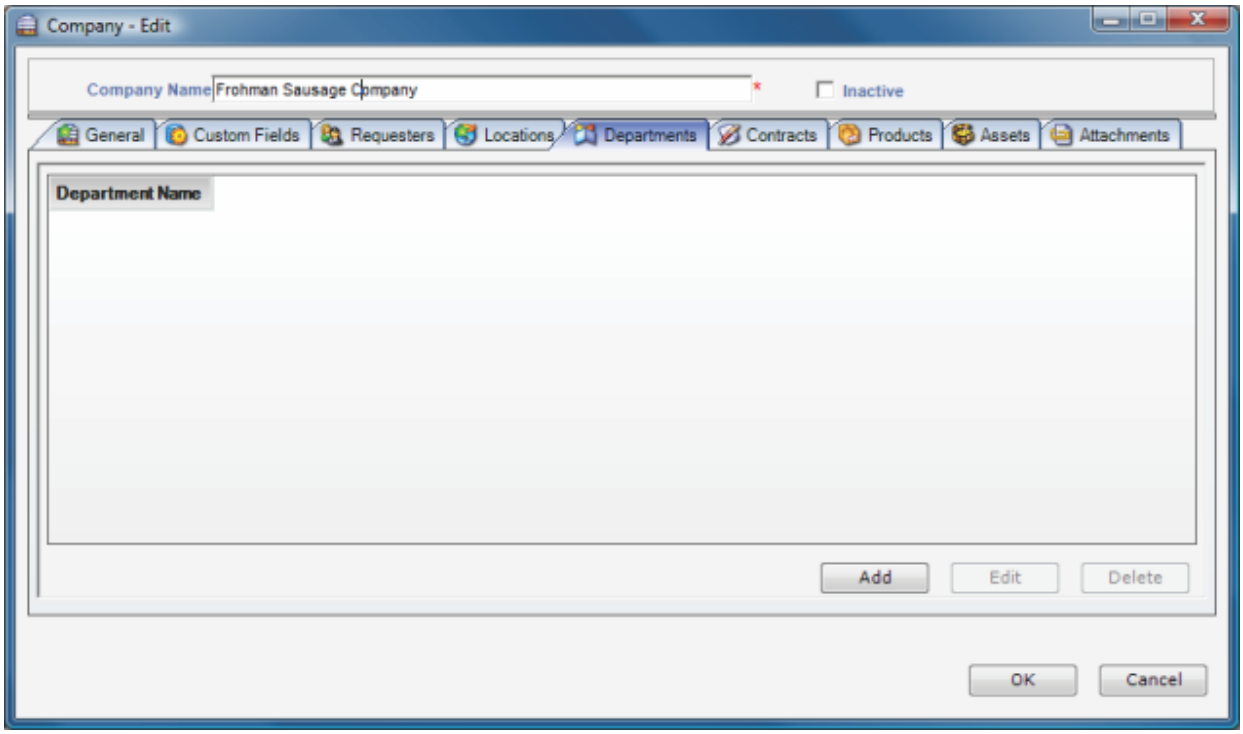
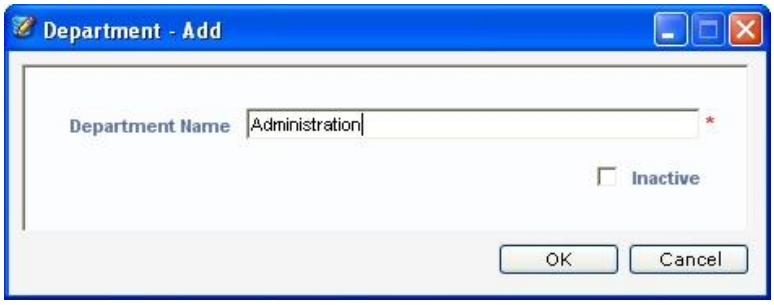
The next tab in the Company – Add window is the Departments tab. Here, you can add, edit or delete departments in a company. By default, there are no departments listed in the window as shown below.



To add a department to your new company, follow the steps below.

1. Click the **Add** button. This opens the Department – Add window.
2. Enter the name of the department in the **Department Name** field.
3. Click the **OK** button.



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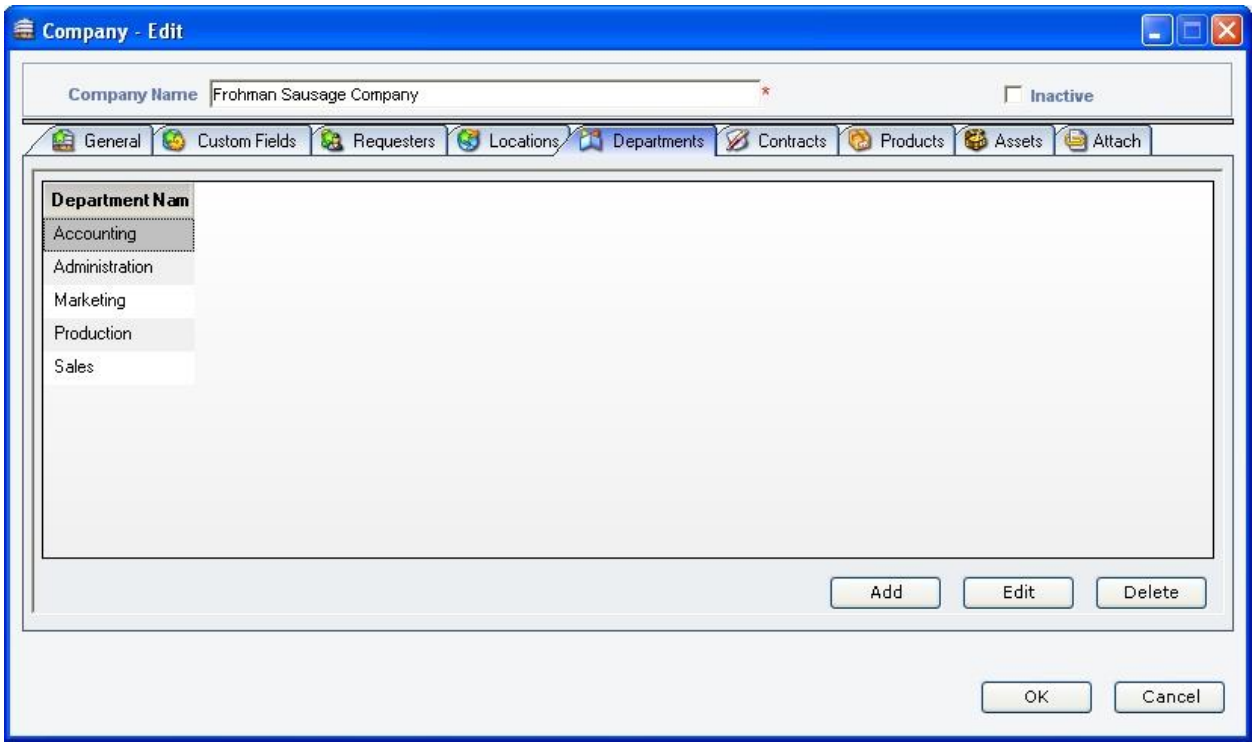
In our example, we have created five departments for our new company.



Next, we will edit a location. Highlight the department you would like to edit and click the **Edit** button. This opens the Department – Edit window, which is exactly the same as the Department – Add window except for the name.

Edit the department name and click the **OK** button to save. The edited department will now appear in the department list.

To delete a department, simply click the department name in the list to highlight it, then click the **Delete** button.

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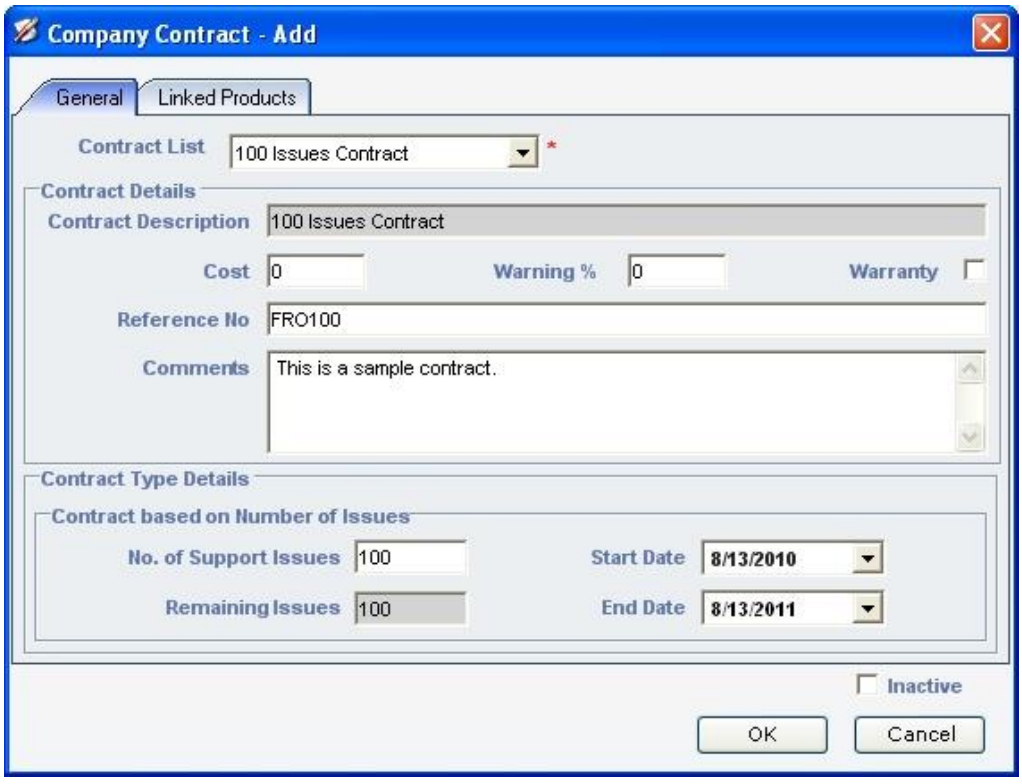
The next tab in the Company-Add window is the Contracts tab. If you would like to link a contract to the new company, follow the steps below.

1. Click the **Add** button. This will open the Company Contract – Add window.
2. Under the General tab, select the contract you wish to assign to the company from the **Contract List** drop-down menu.
3. Enter the reference number in the **Reference No** field if necessary.
4. Add any comments in the **Comments** field
5. The **Start Date** and **End Date** fields will be automatically populated if the contract is based upon duration. If you are using another type of contract, and you wish to include start and end dates, select both dates from the **Start Date** and **End Date** drop-down menus.
6. If you wish to link any products to the contract, click on the Linked Products tab of the Company Contract – Add window. Available products will be listed in the **Available Products** selection list. Use the arrow keys to add or remove products to the **Products Linked to this Contract** selection list on the right.
7. If desired, this contract can be linked to the company but not activated. If you would like to deactivate the contract (but retain the link to the company), check the **Inactive** checkbox.
8. Click the **OK** button when finished.



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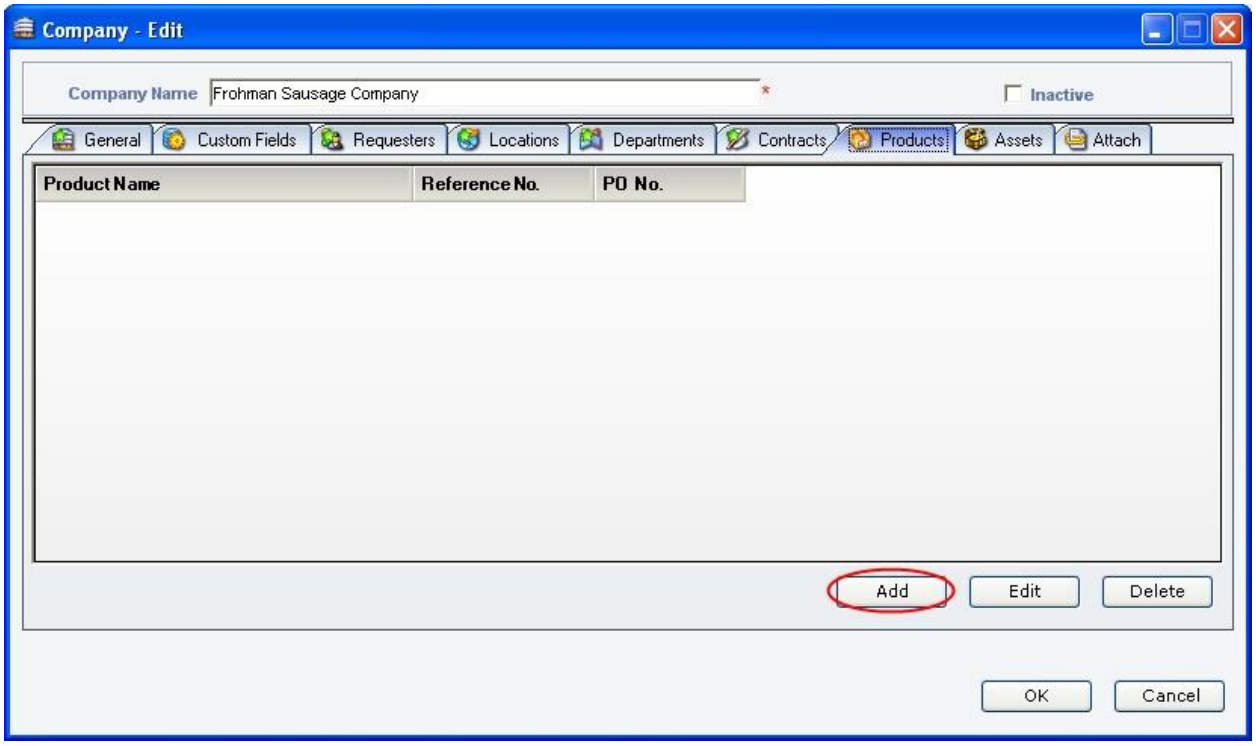
The next tab in the Company – Add window is the Products tab. From here, you can link products to a company.

1. To add a product to the product list, click the **Add** button. This will open the Company Product – Add window.



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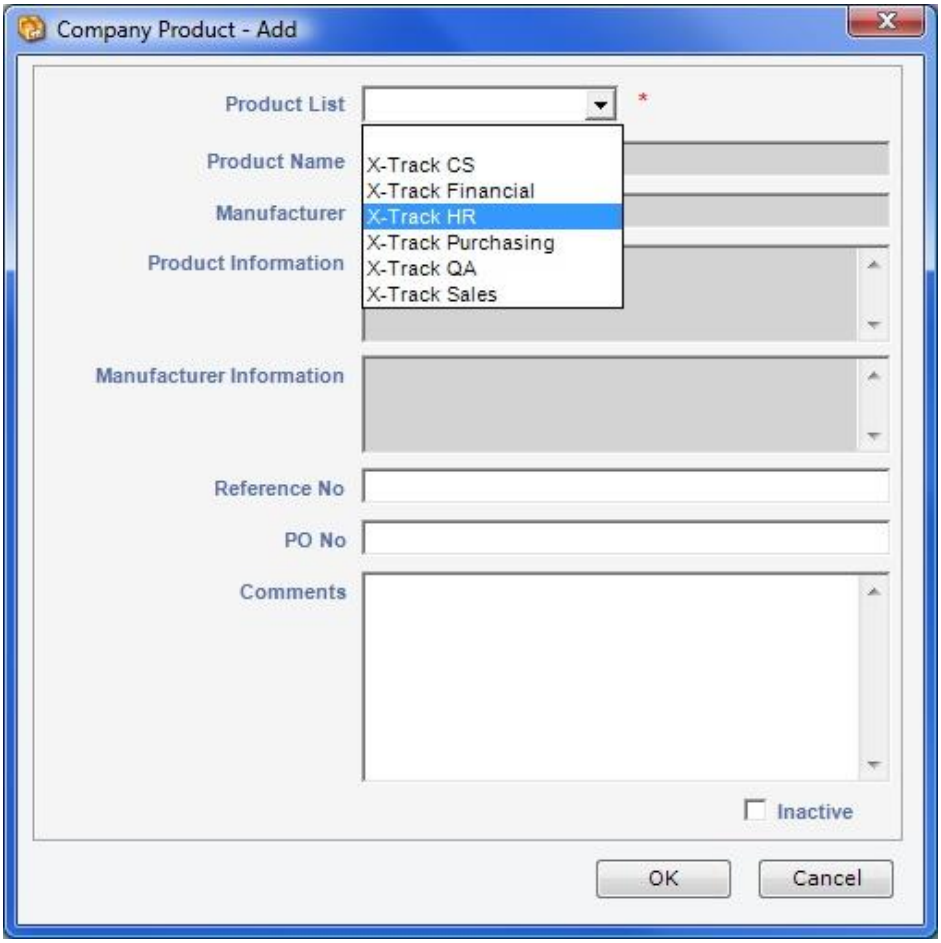
2. Select a product from the **Product List** drop-down menu as shown below (required).



3. The **Product Name**, **Manufacturer**, **Product Information**, and **Manufacturer Information** fields will be automatically populated with the product data.
4. Enter a reference number in the **Reference No** field if needed.
5. Enter a purchase order number in the **PO No** field if needed.
6. Enter any comments in the **Comments** field.
7. Click the OK button when finished. The product is now linked to the company.

A product in the list can be edited or deleted by clicking on the product to highlight it, and then using the **Edit** button (opens the Requester Product – Edit window) or the **Delete** button.

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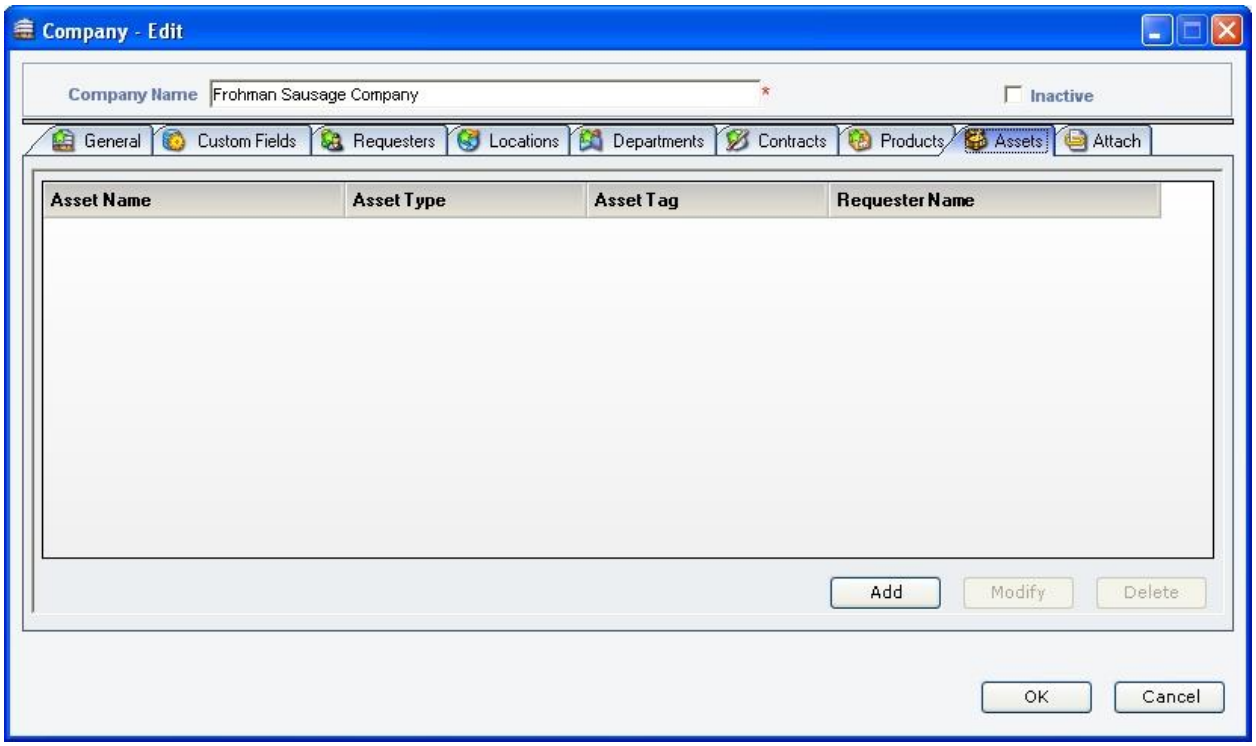
The Asset tab is the next tab in the Company – Add window. This tab is where you will assign assets to an individual customer.



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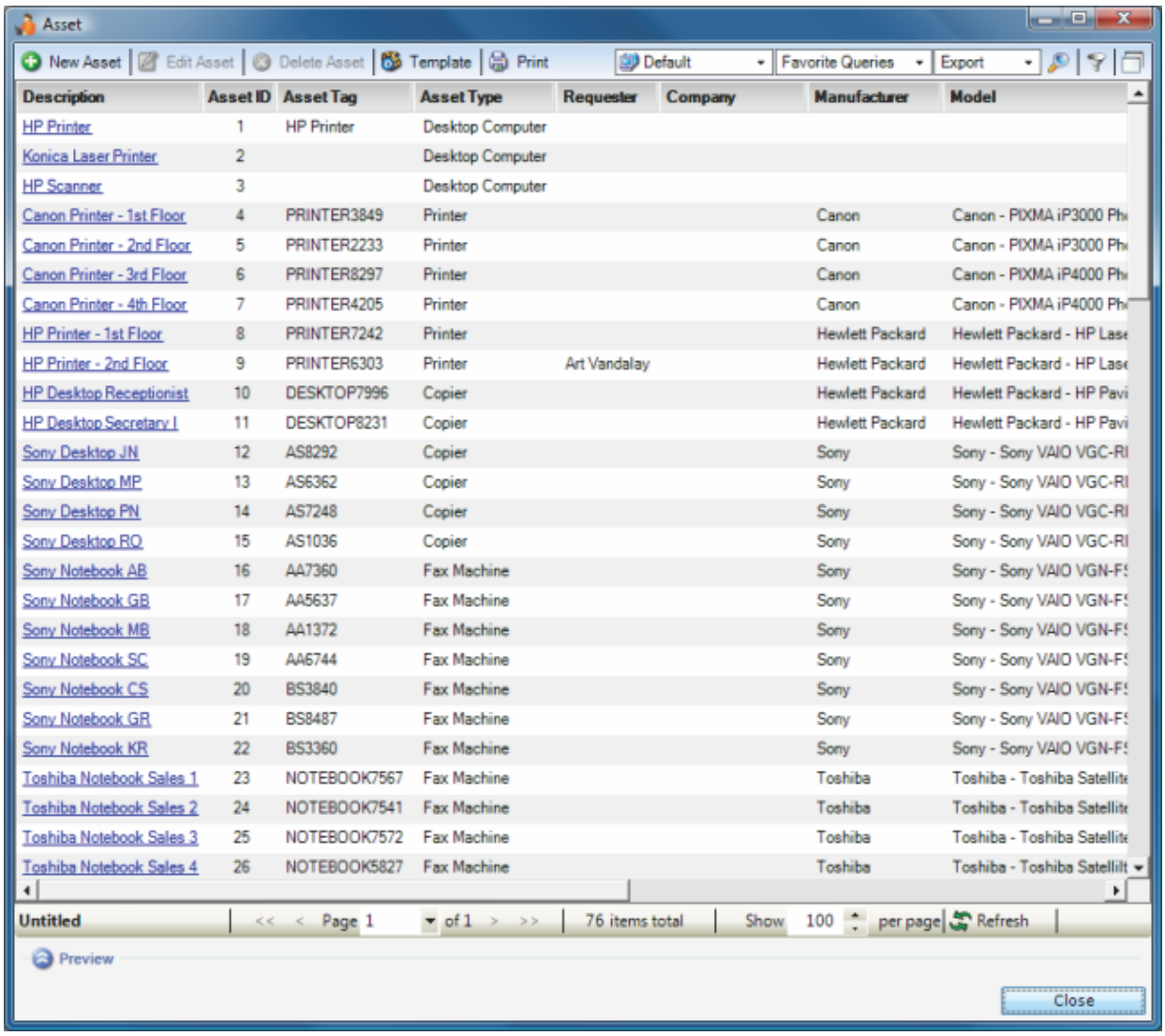
To add an asset or assets to a new company, follow the instructions below.

1. Click the **Add** button. This will open the Assets window.


Asset
New Asset
Edit Asset
Delete Asset
Template
Print
Default
Favorite Queries
Export
Description
Asset ID
Asset Tag
Asset Type
Requester
Company
Manufacturer
Model
HP Printer 1 HP Printer Desktop Computer
Konica Laser Printer 2 Desktop Computer
HP Scanner 3 Desktop Computer
Canon Printer - 1st Floor 4 PRINTER3849 Printer Canon
Canon Printer - 2nd Floor 5 PRINTER2233 Printer Canon
Canon Printer - 3rd Floor 6 PRINTER8297 Printer Canon
Canon Printer - 4th Floor 7 PRINTER4205 Printer Canon
HP Printer - 1st Floor 8 PRINTER7242 Printer Hewlett Packard
HP Printer - 2nd Floor 9 PRINTER6303 Printer Art Vandalay Hewlett Packard
HP Desktop Receptionist 10 DESKTOP7996 Copier Hewlett Packard
HP Desktop Secretary I 11 DESKTOP8231 Copier Hewlett Packard
Sony Desktop JN 12 AS8292 Copier Sony
Sony Desktop MP 13 AS6362 Copier Sony
Sony Desktop PN 14 AS7248 Copier Sony
Sony Desktop RO 15 AS1036 Copier Sony
Sony Notebook AB 16 AA7360 Fax Machine Sony
Sony Notebook GB 17 AA5637 Fax Machine Sony
Sony Notebook MB 18 AA1372 Fax Machine Sony
Sony Notebook SC 19 AA6744 Fax Machine Sony
Sony Notebook CS 20 BS3840 Fax Machine Sony
Sony Notebook GR 21 BS8487 Fax Machine Sony
Sony Notebook KR 22 BS3360 Fax Machine Sony
Toshiba Notebook Sales 1 23 NOTEBOOK7567 Fax Machine Toshiba
Toshiba Notebook Sales 2 24 NOTEBOOK7541 Fax Machine Toshiba
Toshiba Notebook Sales 3 25 NOTEBOOK7572 Fax Machine Toshiba
Toshiba Notebook Sales 4 26 NOTEBOOK5827 Fax Machine Toshiba
Untitled
Page 1 of 1
76 items total
Show 100 per page
Refresh
Preview
Close

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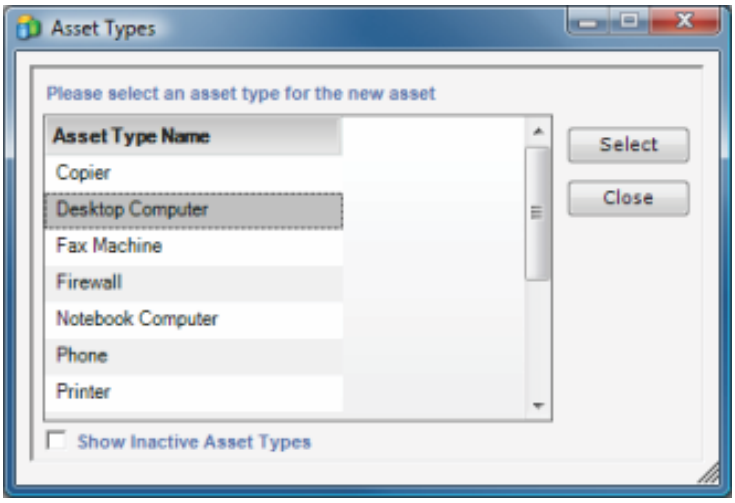
2. Click the **New Asset** button in the upper-right corner of the window. This will open the Asset Types window.



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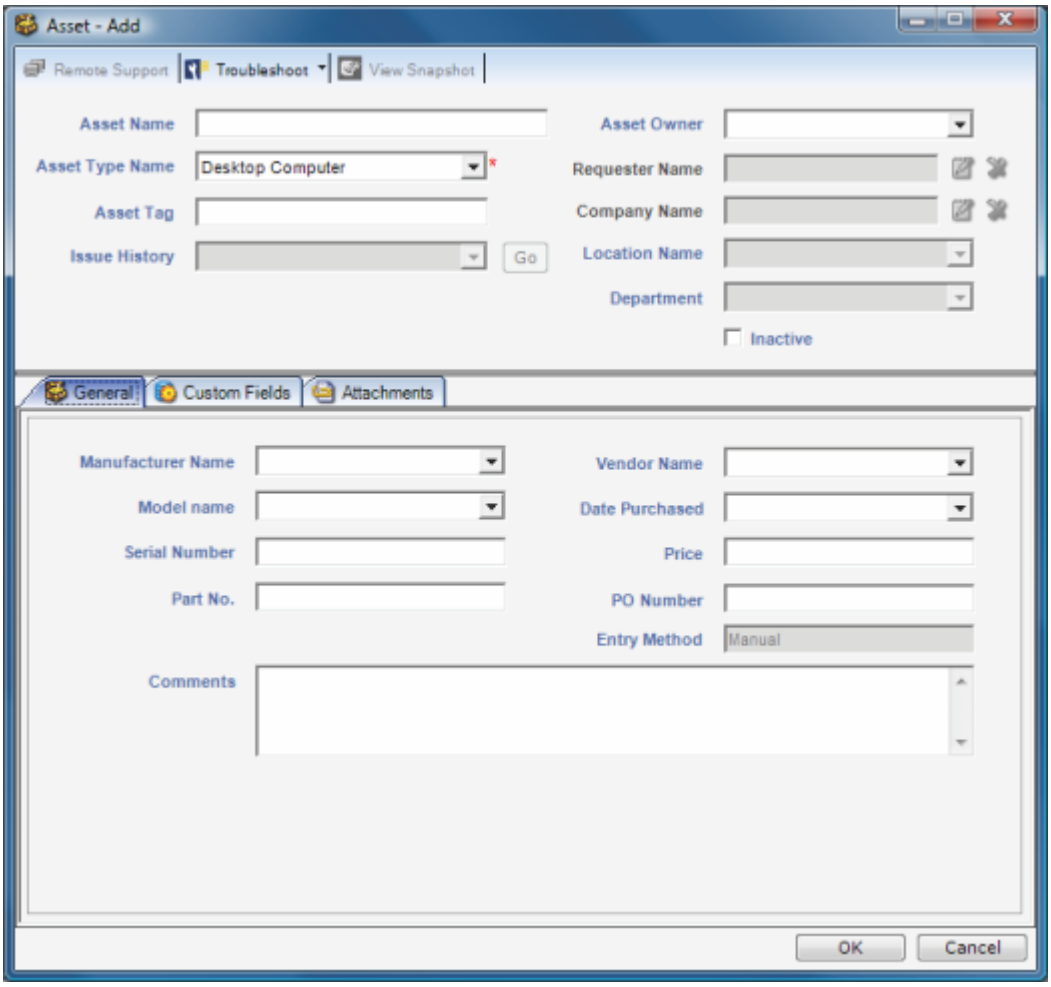
3. Select the appropriate asset type and click the **Select** button. This will open the Asset – Add window.



4. Enter the asset name in the **Asset Name** field.
5. The **Asset Type** field will be populated based upon your selection from the Asset Types window. However, you can change it here if necessary.
6. Enter the asset tag information in the **Asset Tag** field.
7. In the **Asset Owner** drop-down menu, select “Company”.
8. Since you are adding a new company, the **Requester** field is unavailable. Click the **Company Name** field label link. Then click the **Search** button to locate the new company if it has been previously saved during the creation process. If the company is available, click the name and then click the **Select** button. If it is not available, then the **Company Name** field will not require input.
9. If you wish this asset to be inactive initially, check the **Inactive** checkbox.
10. In the bottom half of the Asset – Add window there are three tabs. The first tab is the General tab. Select the manufacturer’s name from the **Manufacturer Name** drop-down menu.
11. Select the model from the **Model** drop-down menu.

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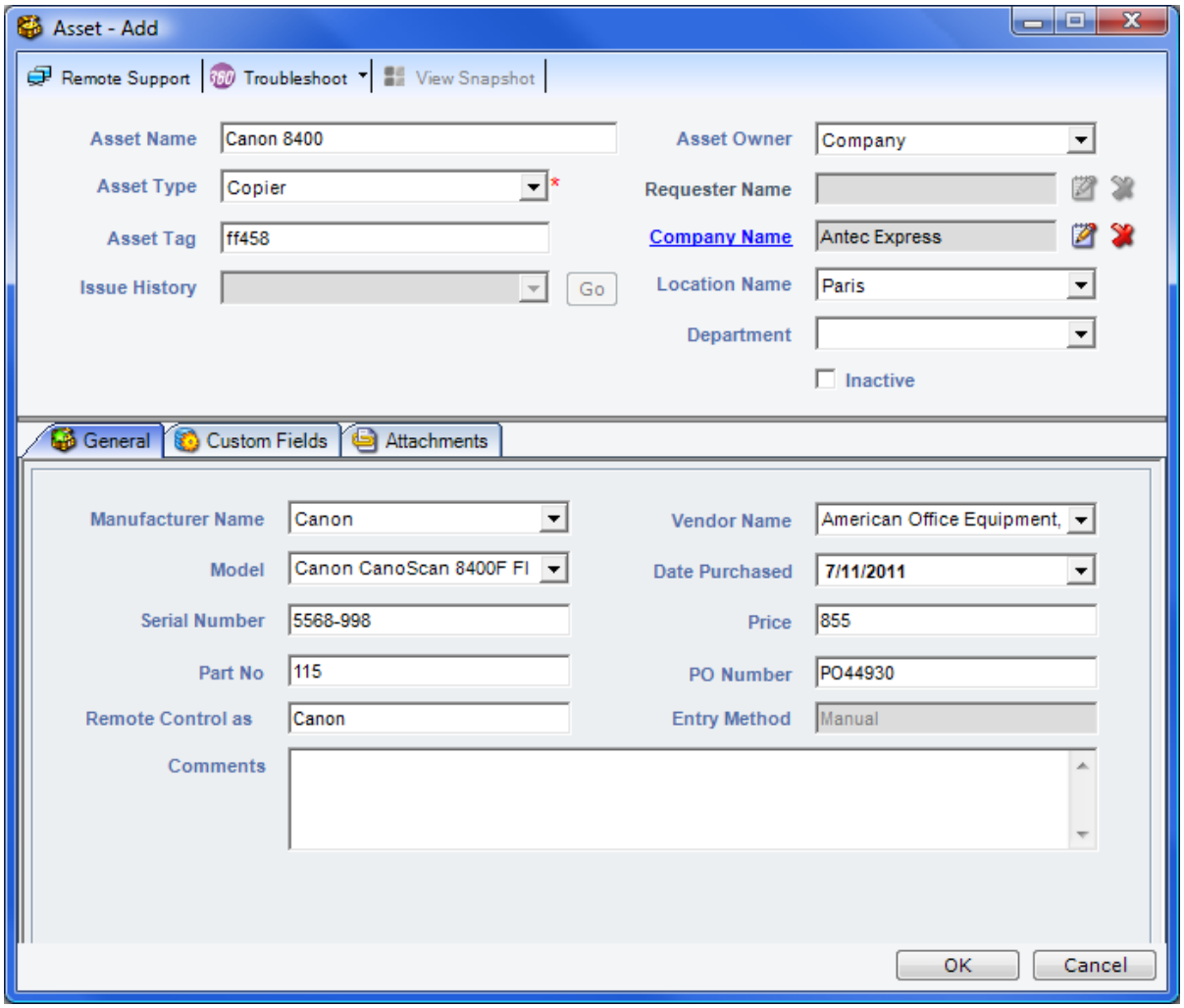
12. Enter the serial number in the **Serial Number** field.
13. Enter the part number in the **Part No** field.
14. Select the vendor name from the **Vendor Name** drop-down menu.
15. Select the date purchased in the **Date Purchased** drop-down calendar.
16. Enter the price in the **Price** field.
17. Enter the PO number in the **PO Number** field.
18. Enter any applicable comments in the **Comments** field.
19. Under the Custom Fields tab, complete any custom fields that may have been created if necessary.
20. Under the Attachments tab, attach any files that might be necessary for this particular asset.
21. When finished entering all necessary information, click the **OK** button. The asset will now be linked with the new company.

Below is a sample of a completed Asset – Add window.



Once the new asset has been linked to the company, you can edit or delete it using the **Edit** and **Delete** buttons.

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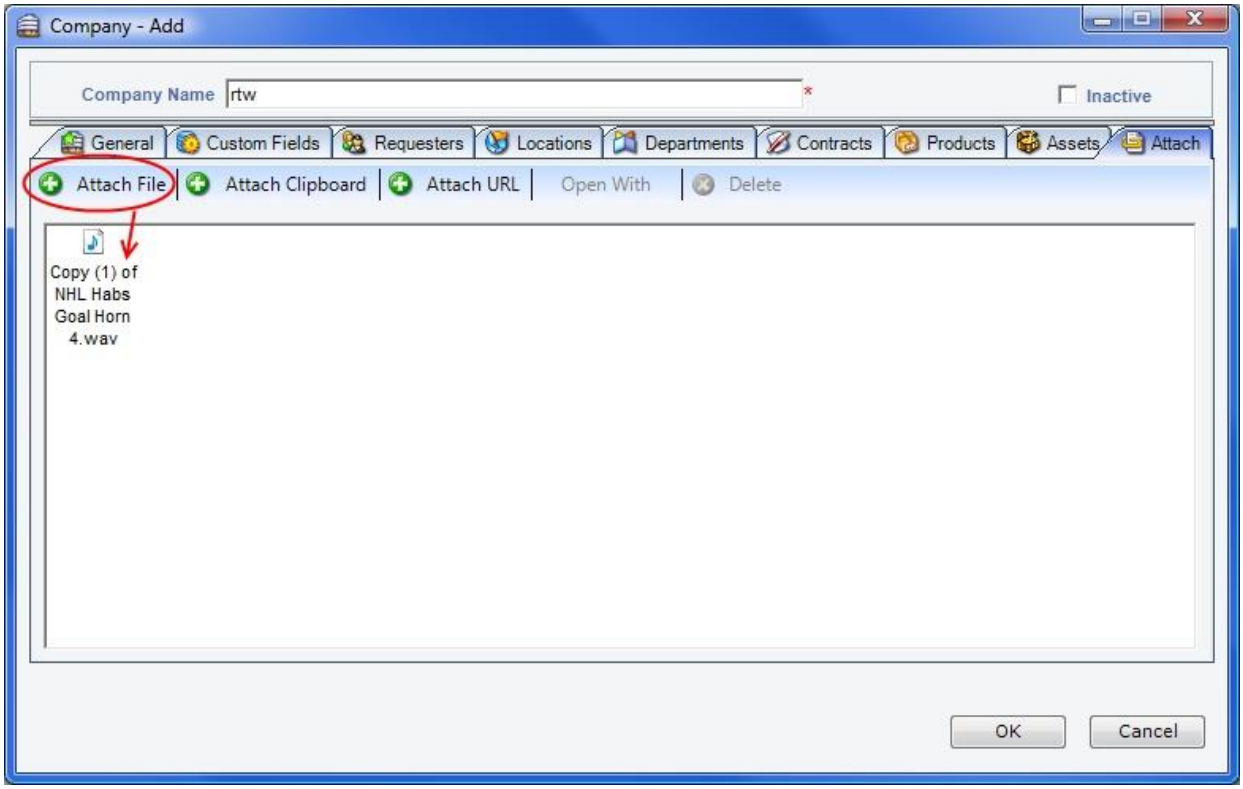
The last tab in the Company – Add window is the Attachments tab. If you would like to attach any files to a company, follow the steps outlined below.

1. If you would like to browse your system for a file to attach, click the **Attach File** button. This will open up a Windows Explorer window. Simply browse to the file you wish to attach, then click the **Open** button. The attached file will appear in the pane below the **Attach** buttons. In our example, an image file has been added as shown below.



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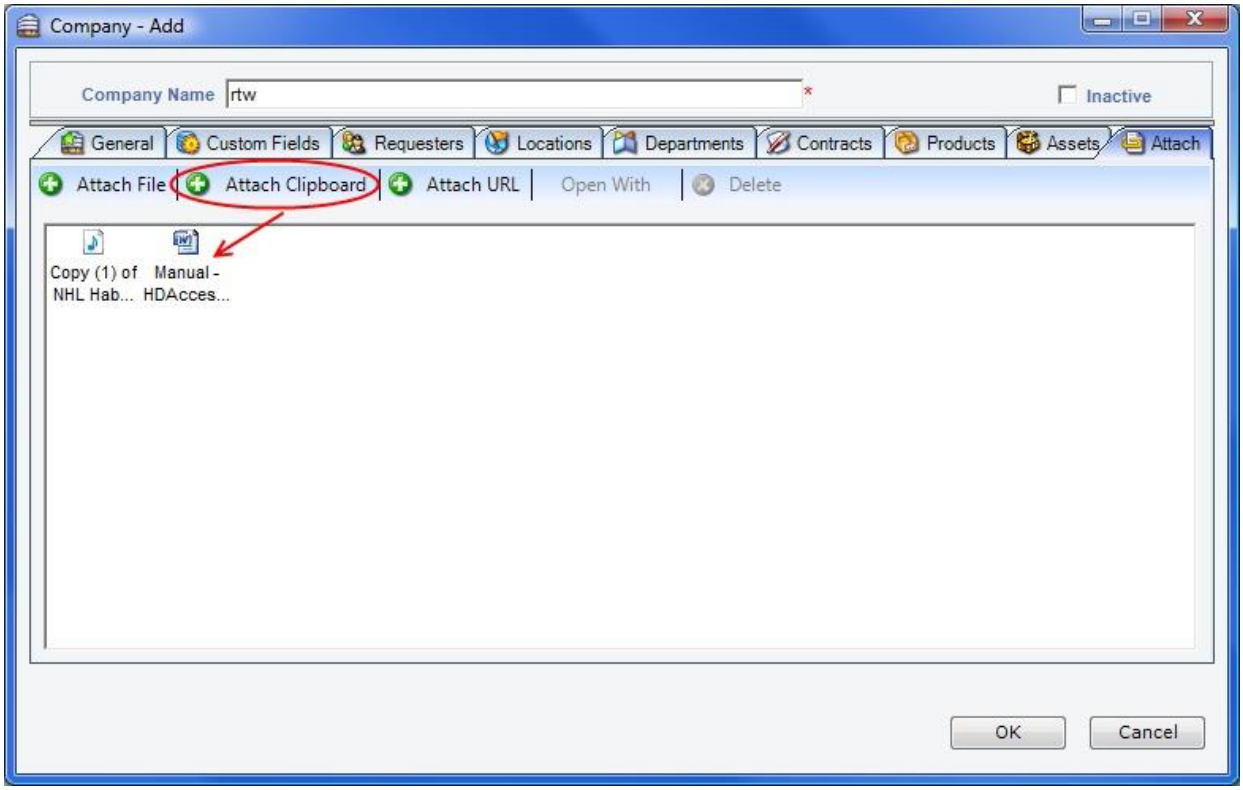
2. If you would like to attach a file that is currently on your clipboard, click the **Attach Clipboard** button. In our example, a PDF document from the clipboard has been attached to this requester.



3. If you would like to attach a URL (website address) to a company, click the **Attach URL** button. This will open the Attach URL window shown below. Enter the web address in the **Web Address** field and the description in the **Description** field. (Both fields are required.) Note that the web address must contain "http://."

4. Click the **OK** button.

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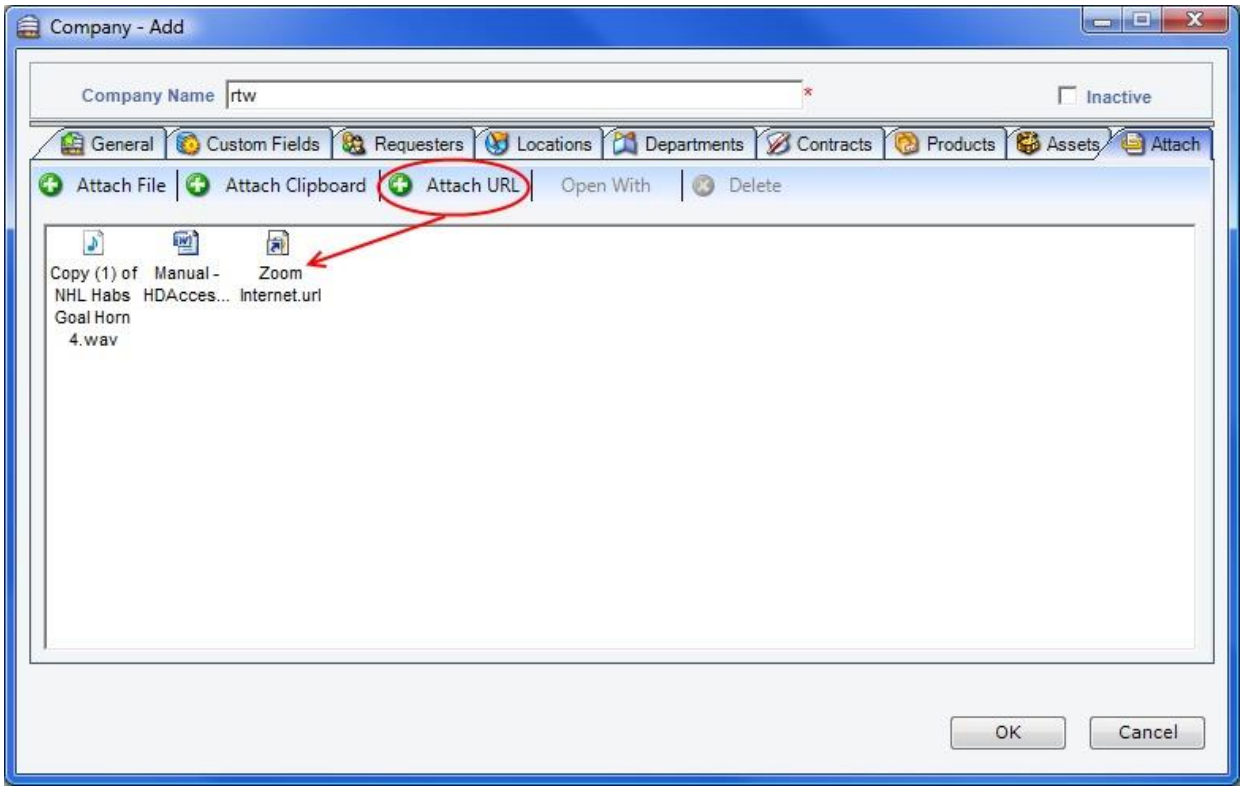
In our example, a URL for Help Desk Authority on the Quest website has been added as shown below.



5. Added attachments can be viewed by single-clicking the attachment to highlight it, then clicking the **Open With** button or by double-clicking the attachment.
6. Added attachments can also be deleted by single-clicking the attachment to highlight it, then clicking the **Delete** button.

To finish setting up a new company:

7. Decide if the company will initially be active or inactive. If inactive, check the **Inactive** checkbox to the left of the **Company Name** field. Otherwise, leave the box unchecked.
8. The new company will appear in the company list on the main screen of the Administration window when **Companies** is selected in the navigation pane.
9. Companies can be modified or deleted at any time by using the **Modify** and **Delete** buttons located at the bottom of the window.

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Asset Management

Through asset management, Help Desk Authority provides an excellent means for keeping an inventory of your organization's assets. In addition to storing information such as serial numbers, locations, and manufacturers, you can also capture key information about the vendors who have sold or who lease the assets to you.

If you choose, your inventory procedures can be expanded with HDAsset, Quest's computer inventory application. It will automatically perform network scans and computer audits of hardware, software, peripherals, components and system information.

If you are an HDAsset user, you can automatically generate comprehensive asset lists. Assets can always be added manually, but if you have a large number of assets that you want to track, we recommend that you import them via HDAsset.

Asset Types

Asset Management > Asset Types

Before creating asset records, you should first decide how your assets should be categorized. These categories are defined by setting up asset types. The categories can be as broad as "Hardware and Software" or as specific as "Laser Printers", "Inkjet Printers", "CD Label Printers", etc. Once asset types have been determined, you can create them in Help Desk Authority. If you are unsure of the asset types you want to create, you can edit or delete them at a later time.

For HDAsset users, asset types are typically a breakdown of PCs and Servers that you are auditing, such as Desktop, Laptop, Server, etc. Assets in HDAsset will have an asset type of "Audited by HDAsset". Likewise, your asset types may also incorporate assets that are not auditable through HDAsset but are part of your company inventory, such as phones or handheld devices.

It is important to note that each asset must be assigned an asset type. Therefore, you must create at least one asset type. For example, if you choose not to categorize your assets by type, you can create one category called "Asset" and then assign this type to all assets that you create.

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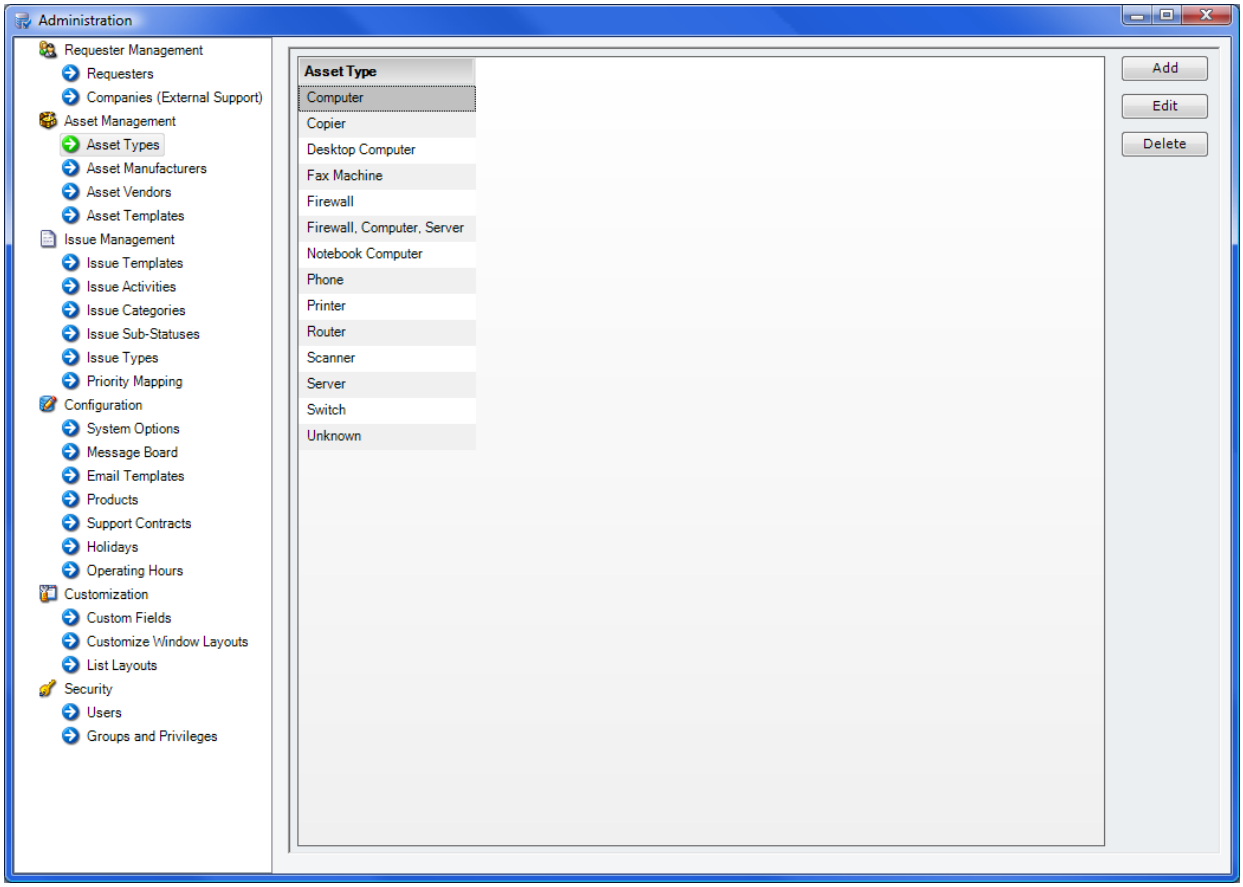
Adding a New Asset Type

Under Asset Management, select **Asset Types**.



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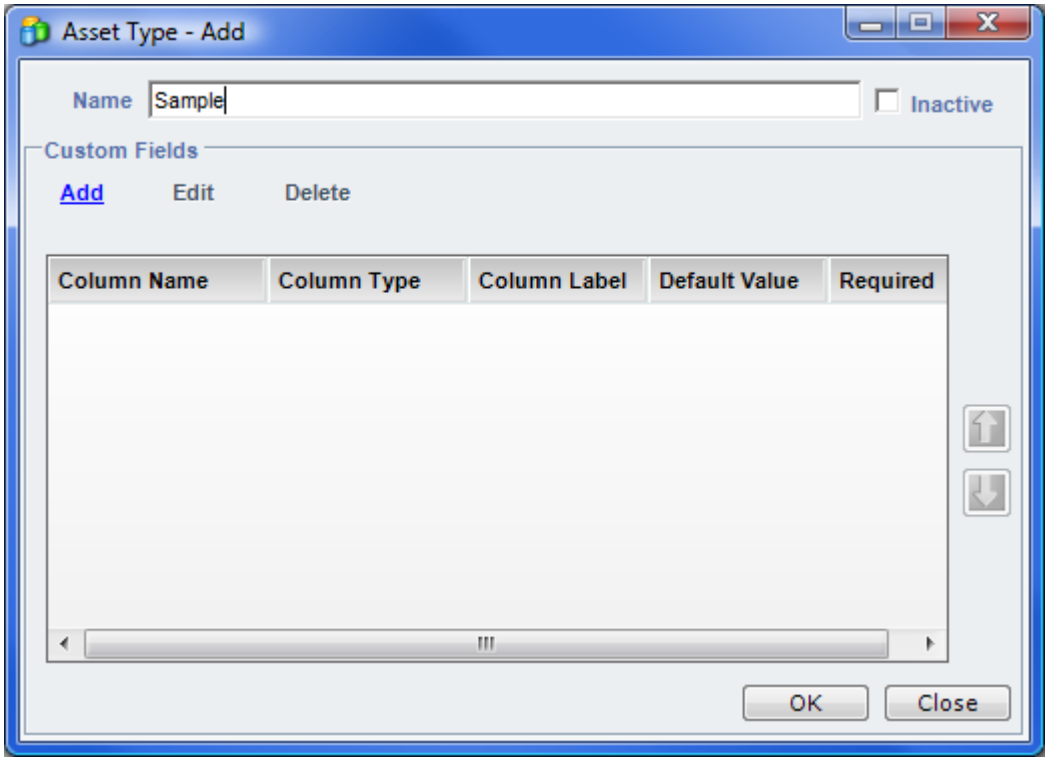
1. Click the **Add** button. This will open the Asset Type – Add window.



2. Enter the **Asset Type**. Check the "**Inactive**" checkbox if you would like to set this asset type to inactive. You can always activate it later.

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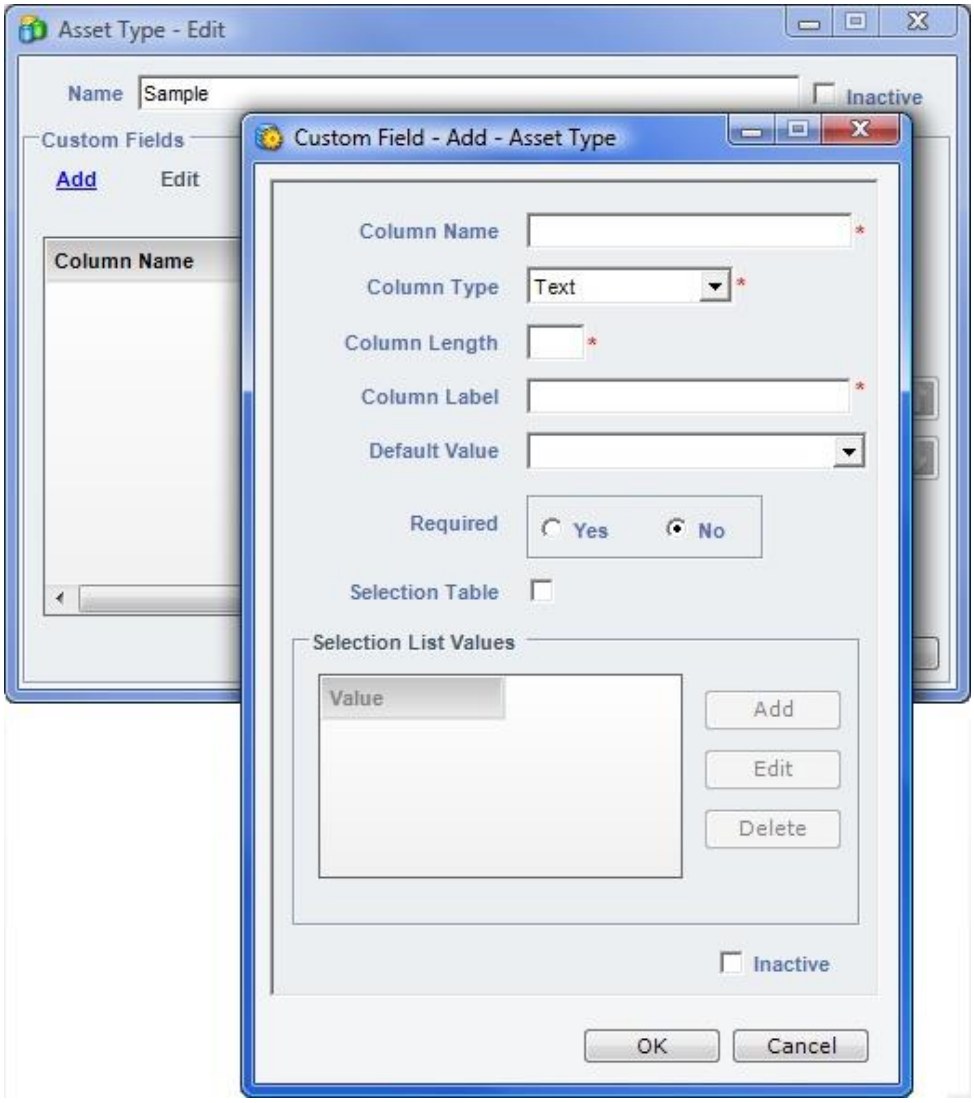
3. If you would like to add custom fields to this new asset type, click the "**Add**" link as shown below. Note that your new asset type must be named and saved before adding custom fields. The Add link will not be active until an asset type name has been entered. To save your asset type before adding custom fields, click the **OK** button, then re-open the new asset type using the **Edit** button in the Asset Types window shown above. This will open the Custom Field – Add – Asset Type window. Complete the appropriate fields to set up the custom field and click the **OK** button.



4. Once the asset type is complete, click the **OK** button. The asset will now appear in the Assets list in the Asset Types window.
5. Note that custom fields in an asset type can also be edited or deleted using the **Edit** and **Delete** links in the Asset Type – Edit window.
6. If you would like to edit or even delete an asset type at any time, use the **Edit** and **Delete** buttons in the Asset Types window.

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7. If you are attempting to delete an asset type that is in use, you will receive a message like the one shown below. Click the **OK** button and Help Desk Authority will automatically give the asset type an “Inactive” status. If the asset type is “Inactive”, it can be eliminated from queries, drop-down menus, and reports. Click the **Cancel** button to retain the asset type’s “Active” status and to cancel the deletion request.

8. If the asset type is not in use when you attempt to delete it, Help Desk Authority will display a message like the one shown below. Click the **OK** button to confirm the deletion, or click the **Cancel** button to cancel it.

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Asset Manufacturers

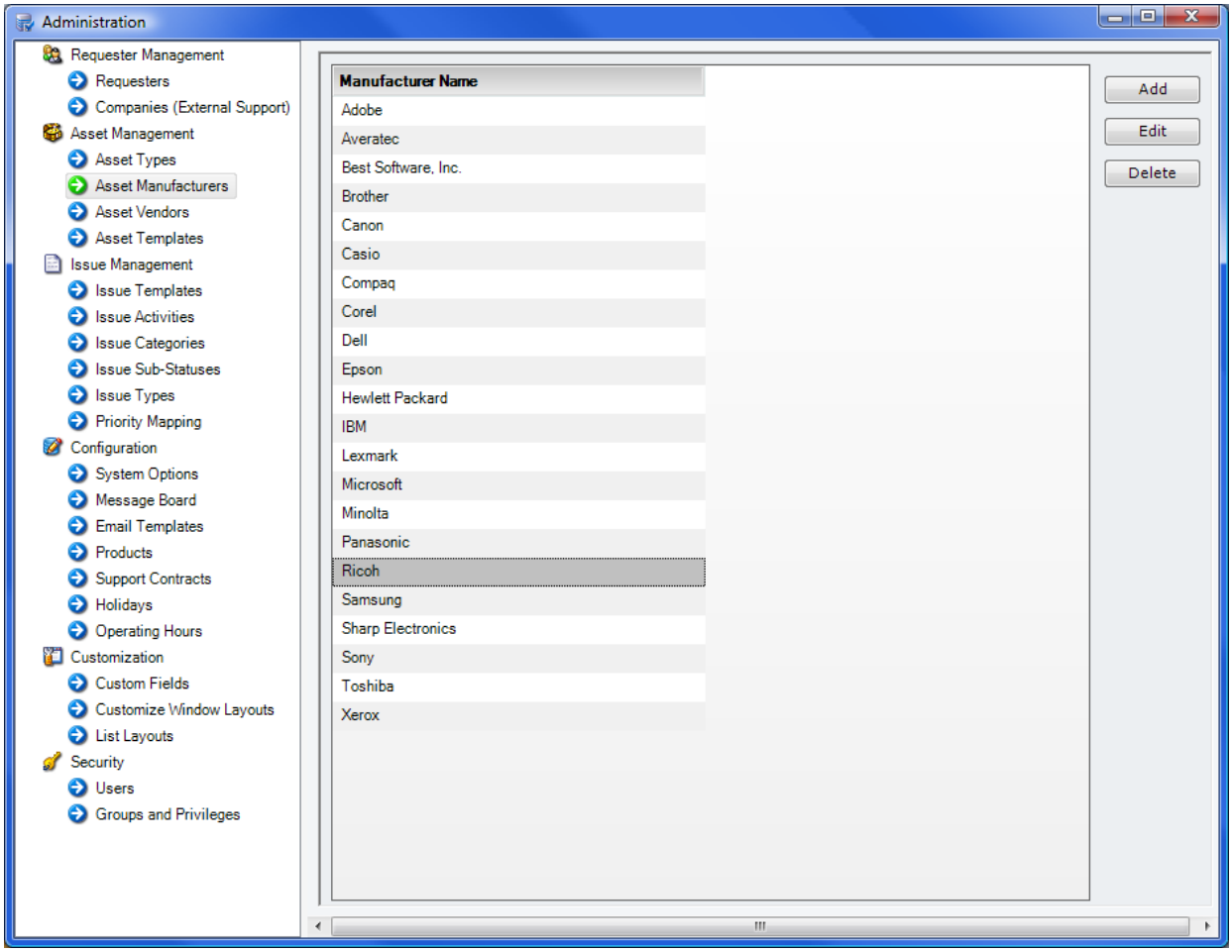
Asset Management > Asset Manufacturers

When tracking and auditing assets, it is important to know who manufactures them. Help Desk Authority enables you to capture and maintain manufacturer information as well as the model numbers for the items that they supply.

For HDAsset users, the manufacturer of the PC is automatically detected when a workstation is audited and is found in the HDAsset computer details view.

Adding a New Asset Manufacturer

Under Asset Management, select **Asset Manufacturers**.



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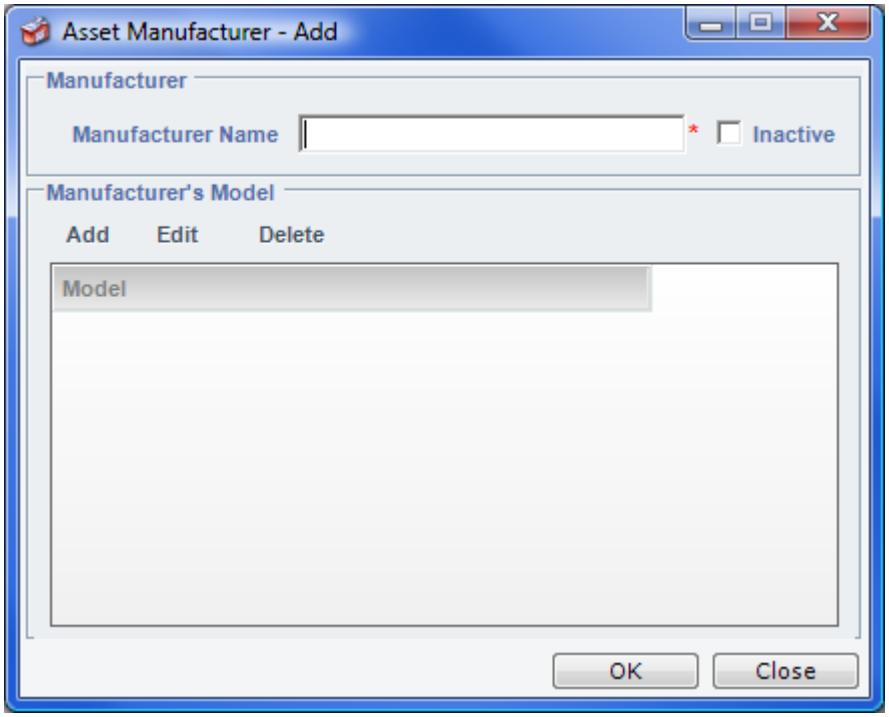
1. Click the **Add** button. This will open the Asset Manufacturer – Add window.



2. Enter the name of the manufacturer and click the OK button.
3. The new manufacturer will appear in the manufacturer name list.
4. If you would like to edit or delete an asset manufacturer at any time, use the **Edit** and **Delete** buttons in the Asset Manufacturers window.

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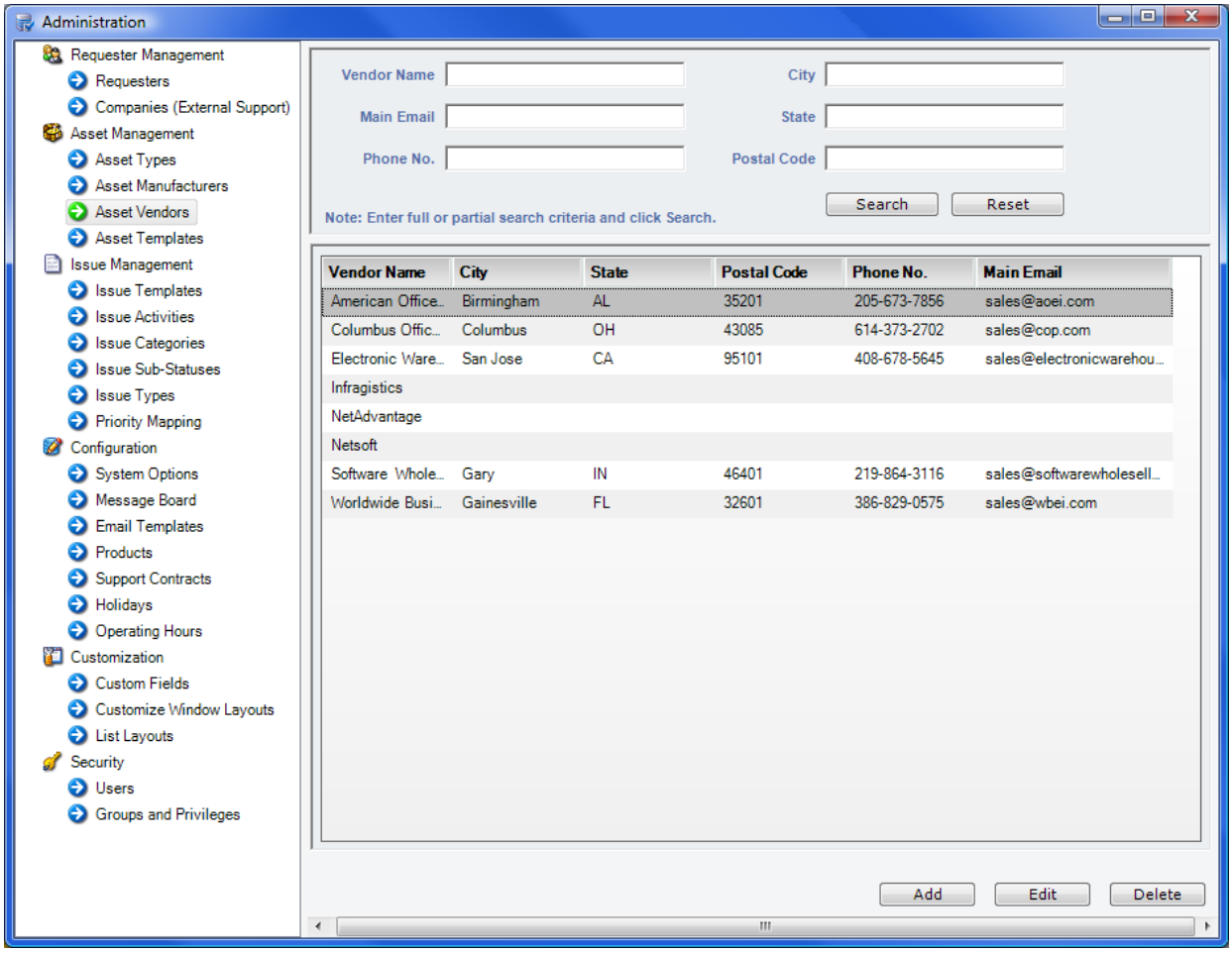
Asset Vendors

Asset Management > Asset Vendors

Help Desk Authority gives you the capability of assigning vendors to assets. In this way, you are able to track and maintain key information pertaining to the vendors that have sold assets to you.

For HDAsset users, vendor information typically pertains to the vendors that sell or support your computer assets.

Adding a New Asset Vendor



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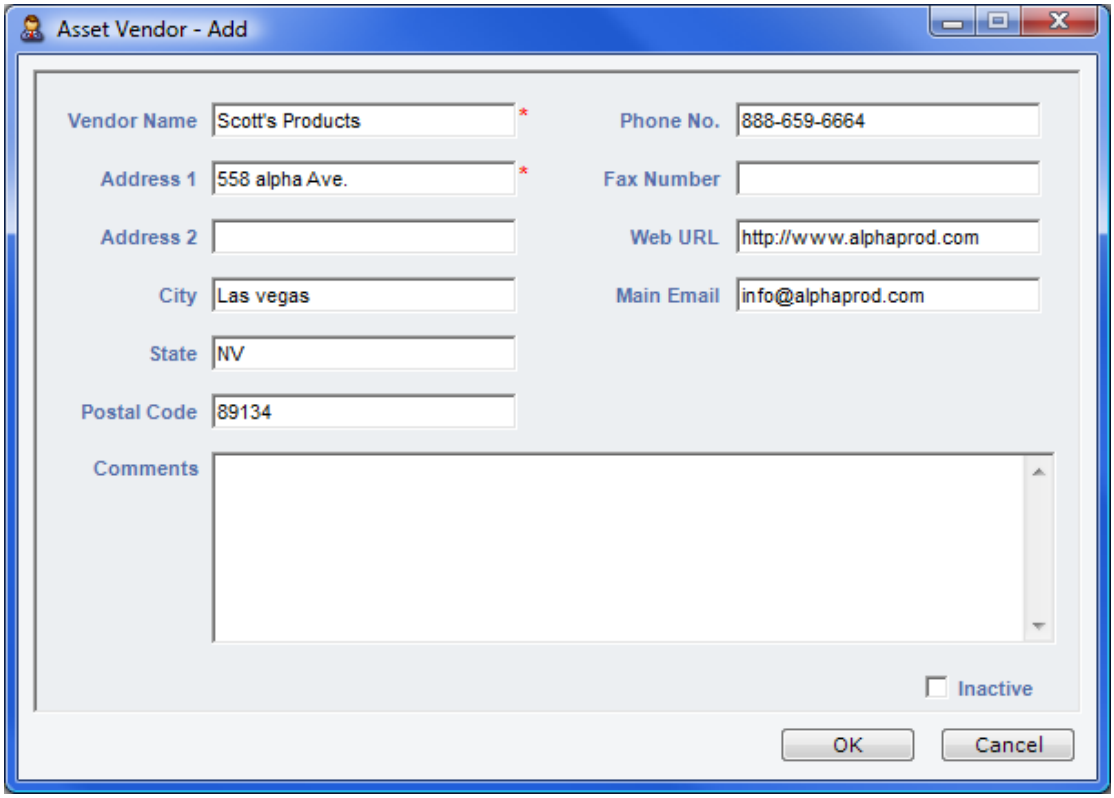
1. Click the **Add** button at the bottom of the window. This will open the Asset Vendor – Add window as shown below.
2. Enter as much information as is available into the appropriate fields, then click the **OK** button.



3. The new asset vendor will now appear in the asset vendor list. If you would like to edit or even delete an asset vendor at any time, use the **Edit** and **Delete** buttons in the Asset Vendors window.

Asset Templates

Asset Management > Asset Templates

Entering asset information can be a tedious task, especially when many assets can share much of the same information. You can avoid the repetitious chore of entering the same asset information over and over again by using asset templates.

You can define as many asset templates as you like. On each template, enter the information repeated from asset to asset. Then when adding asset records, much of the information for the new asset will already be completed.

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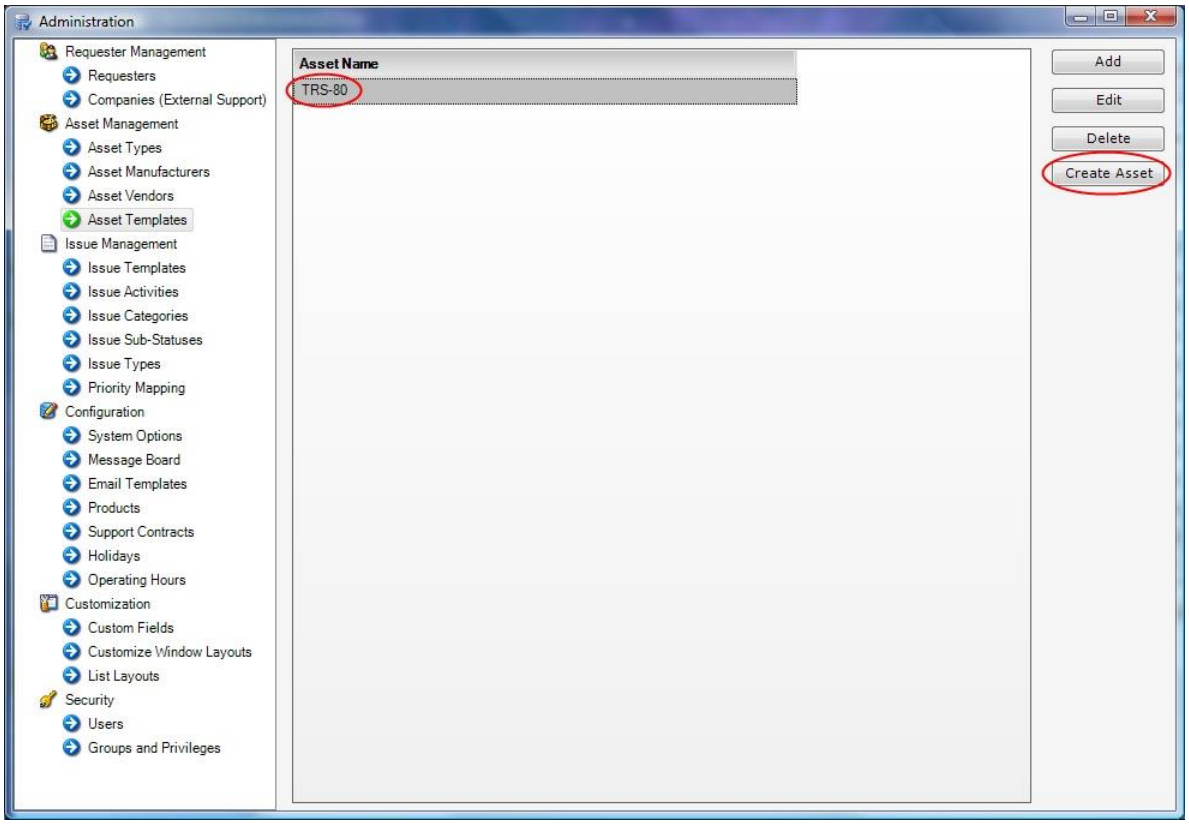
Creating an Asset Template

1. Click the **Add** button in the upper right corner of the window. This will open the Asset Types window.
2. Select the asset type that you will be creating a template for by clicking on the name of the asset type. You can double-click the asset type name or simply select it and click the **Select** button. This will open the Asset – Add window.
3. The only required field when building an asset template is the **Asset Type** field. When you select an asset type, you will be prompted with the Asset - Add pop-up window notifying you that "Changing the Asset type will change the Custom Fields". Click the **OK** button to close this window.
4. Enter the pertinent information in the appropriate fields. This information will now be automatically included when this asset template is used to create a new asset. Click the **OK** button.
5. The new asset template has now been created and will appear in the asset templates list. To create a new asset from this template, select the template from the list and click the **Create Asset** button as shown below. Also note that if no asset template is selected, the **Edit**, **Delete** and **Create Asset** buttons are grayed out.



6. If you would like to edit or delete an asset template at any time, use the **Edit** and **Delete** buttons in the Asset templates window.

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Issue Management

Issues are items that are tracked from inception to closure. issues track information on reported incidents including:

- Who reported the issue
- To whom the issue was assigned
- The issue category, priority, and status
- The assets involved
- The actions taken toward the issue's resolution
- Time spent and associated costs

Accurate issue records will help you to optimize resolution time, better manage your workloads and facilitate communication with your customers.

Help Desk Authority's issue management enables you to:

- Link related issues with dependencies (assets, vendors, manufacturers, requesters, etc.) promoting easy and logical workflow.
- Route issues to personnel based on group, status and expertise using the Skills Based Assignment feature.
- Apply your organization's hours of operation to accurately age and manage issues.
- Link issues to products you support and contracts you service.

Issue Templates

Issue Management > Issue Templates

In Help Desk Authority you can define issue templates for issues that occur frequently and contain common data. You can then retrieve the template when entering issues with similar information. The repetitive data will be automatically duplicated each time the issue template is used.

When defining an issue template, the following issue fields can be duplicated:

- Priority
- Category
- Issue type
- Assigned Group
- Assigned User
- Summary
- Description
- Resolution

After your issue template has been defined, you can instruct Help Desk Authority to automatically create issues using the template according to a schedule that you define. This is done via Help Desk Authority's recurring issue feature.

Recurring issues allow you to define an issue that will recur at a specified time interval. The most common applications of this feature involve routine maintenance tasks that would be performed on a daily, weekly, or monthly basis. For example, the Information Systems department may define a Recurring issue to backup databases on a weekly basis.

A recurring issue is an issue template that runs on a user-defined schedule. This schedule tells Help Desk Authority when and how often to create an issue using the issue template to populate the issue fields.

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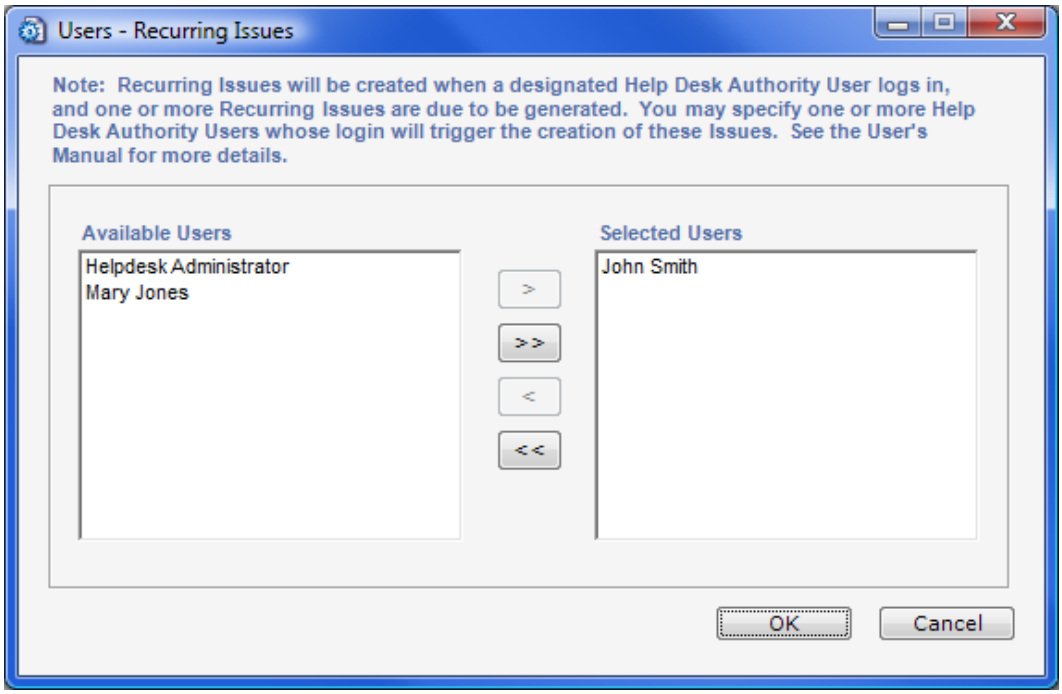
Defining Users for Creating Recurring Issues

Help Desk Authority has the ability to create templates for issues that recur automatically (explained later in this section). These issues can be automatically generated and assigned to certain individual users. When a user is defined to receive a recurring issue, the issues, if any are scheduled, will be created when that specific user logs into Help Desk Authority.

To define users for creating recurring issues:

1. Select **Issue Templates** from the navigation pane. This will open the Issue Templates window.
2. Click the "**Define Users for creating recurring issues**" link at the bottom of the window. This will open the Users – Recurring Issues window.


Users - Recurring Issues
Note: Recurring Issues will be created when a designated Help Desk Authority User logs in, and one or more Recurring Issues are due to be generated. You may specify one or more Help Desk Authority Users whose login will trigger the creation of these Issues. See the User's Manual for more details.
Available Users
Helpdesk Administrator
Mary Jones
Selected Users
John Smith
>
>>
<
<<
OK
Cancel

3. Using the arrow buttons, move users from the Available Users pane to the Selected Users pane. These will be the users who, upon login, trigger the creation of recurring issues assigned to them.
4. Click the **OK** button.

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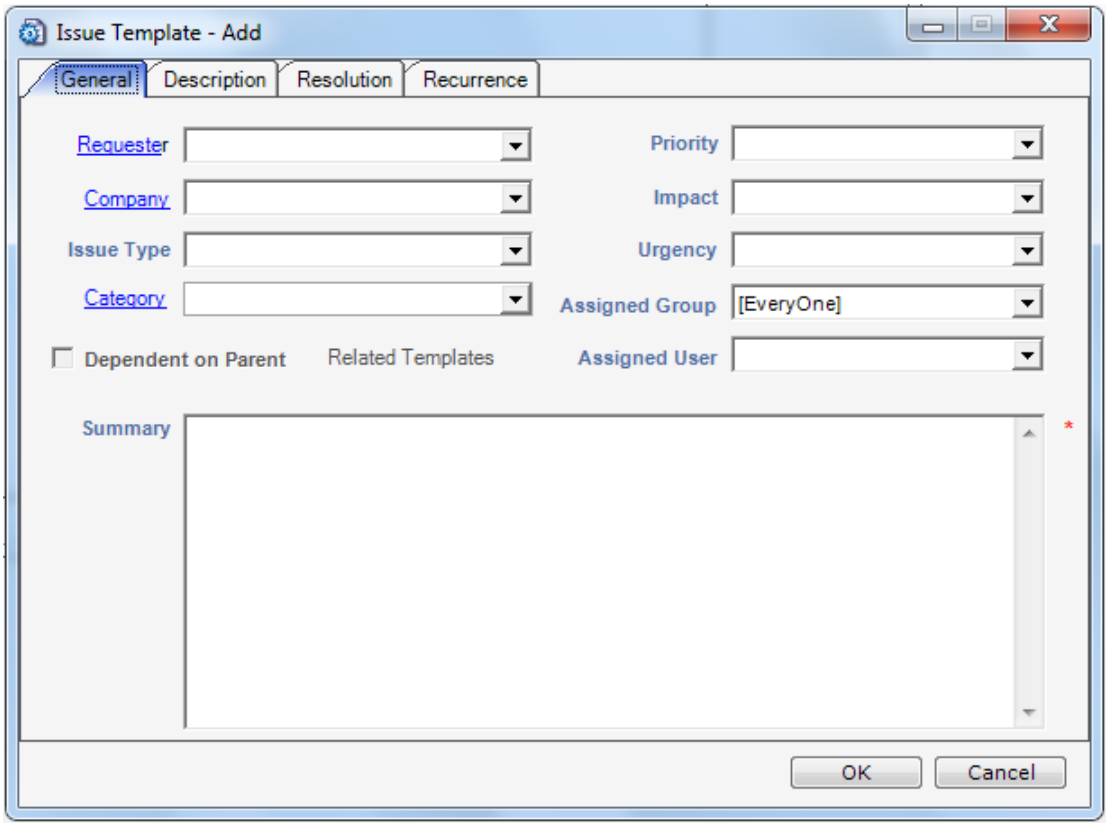
Creating an Issue Template

1. Click the **Add** button. This will open the Issue Template – Add window as shown below.



2. There are four tabs in the Issue Template – Add window:
   - General – Contains basic information most likely to be repeated in recurring issues.
   - Description – A large text field for the description of the issue.
   - Resolution – A large text field for resolution notes.
   - Recurrence – Enables the generation of an issue based on a recurring schedule.
3. Complete the fields in the first three tabs with the information that will be repeated for new issues using this template.

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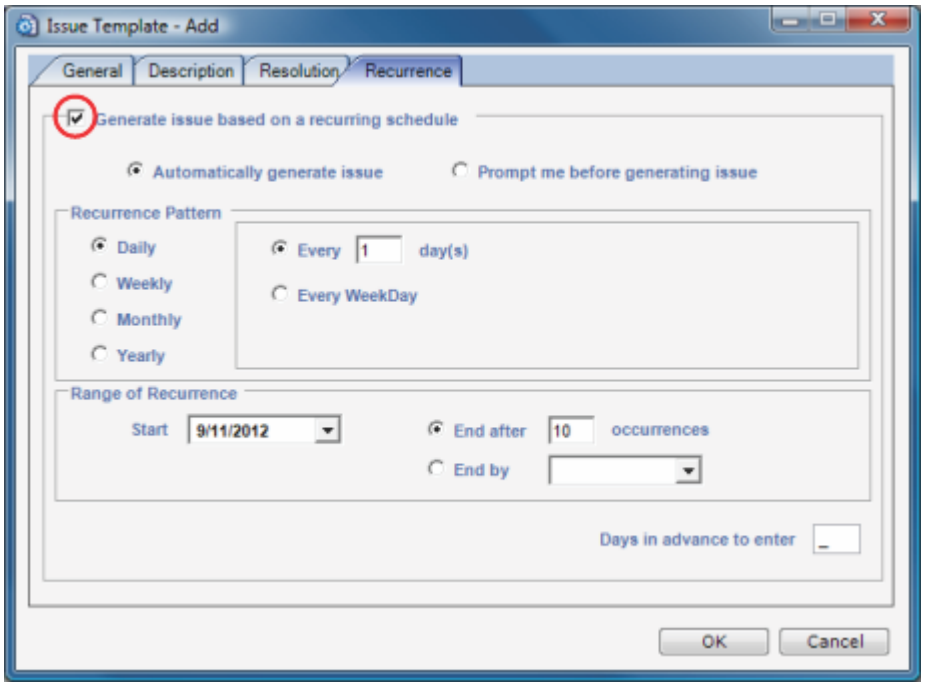
4. In the Recurrence tab, check the check box labeled "**Generate issue based on a recurring schedule**" if this will be a regular and recurring issue.



5. If you wish Help Desk Authority to create the issue automatically, check the radio button labeled "**Automatically generate issue**", otherwise, check the radio button labeled "**Prompt me before generating issue**".
6. In the Recurrence Pattern section, click the corresponding radio button for **Daily**, **Weekly** **Monthly** or **Yearly**.
7. If you select **Daily**, enter the number of days between recurrences, or check the **Every weekday** radio button.
8. If you select **Weekly**, enter the number of weeks between recurrences, then select the days on which the occurrence takes place.
9. If you select **Monthly**, you have the option of selecting the date that the occurrence will take place each month, or you can select the first, second, third, fourth or last day (or specific day) of each month (or every x number of months) if the exact date will change.
10. If you select **Yearly**, you can specify a single date for the occurrence to take place each year, or you can select the first, second, third, fourth or last day (or specific) day of a specific month if the exact date will change.
11. You can also set a date range for your recurring issue in the Range of Recurrence section. First, select a start date, then select either the number of total occurrences or an end date.
12. In the **Days in advance to enter** field, enter the number of days in which you would like to be notified before the scheduled issue occurs. For example, if you enter a "2" in this field and you have a recurring issue that is due to be opened on August 6th, when you login to Help Desk Authority on August 4th, you will be notified that an issue is due to be open on August 6th.

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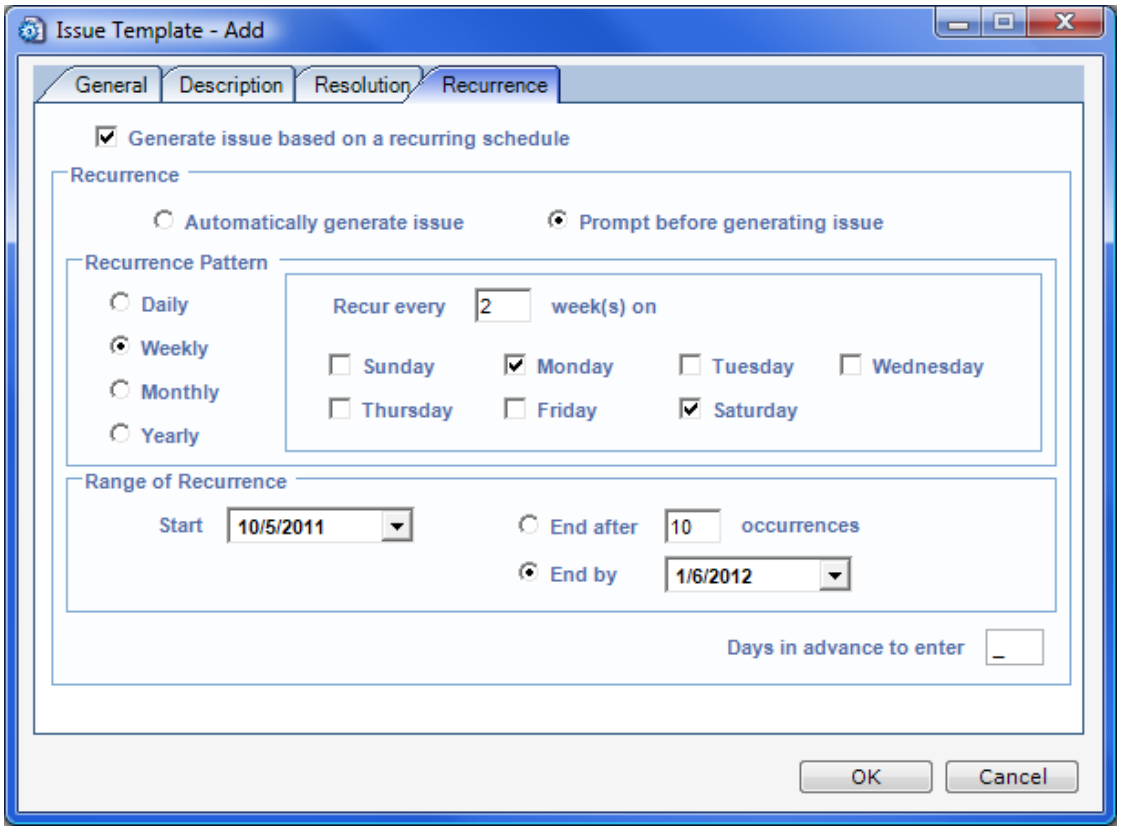
13. In the example below, the recurring issue is automatically generated and occurs every two weeks on Monday and Saturday, beginning on 8/10/2010 and ending on 7/10/2011.



14. Click the **OK** button.
15. If you would like to edit or even delete an issue template at any time, use the **Edit** and **Delete** buttons in the Issue Templates window

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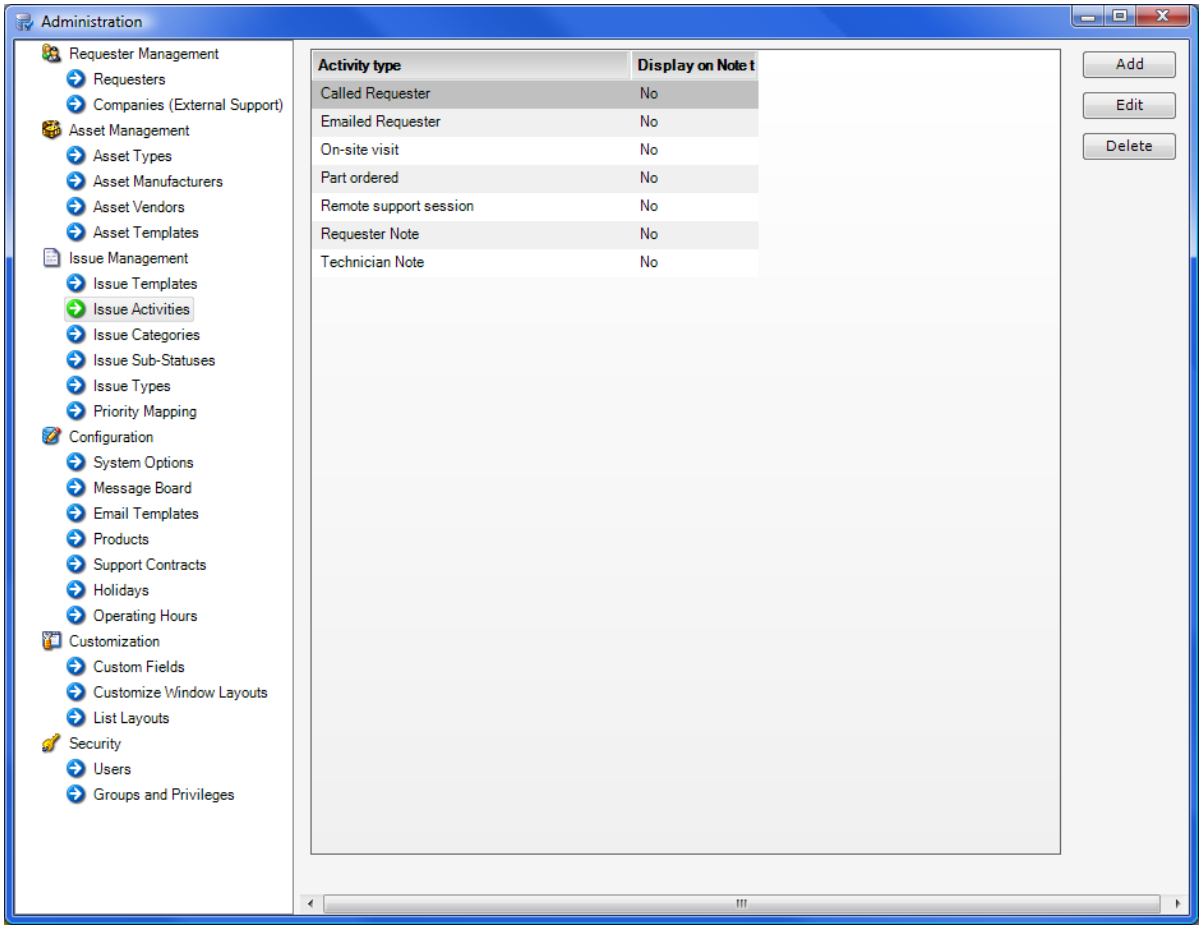
Issue Activities

Issue Management > Issue Activities

Issue activities are the various steps taken to address and resolve issues. By creating common activity types to use in issue management, you can quickly update an issue with a previously defined activity.

Creating an Issue Activity Type

1. Click the **Add** button in the upper right corner of the window. This will open the Issue Activity Type – Add window.



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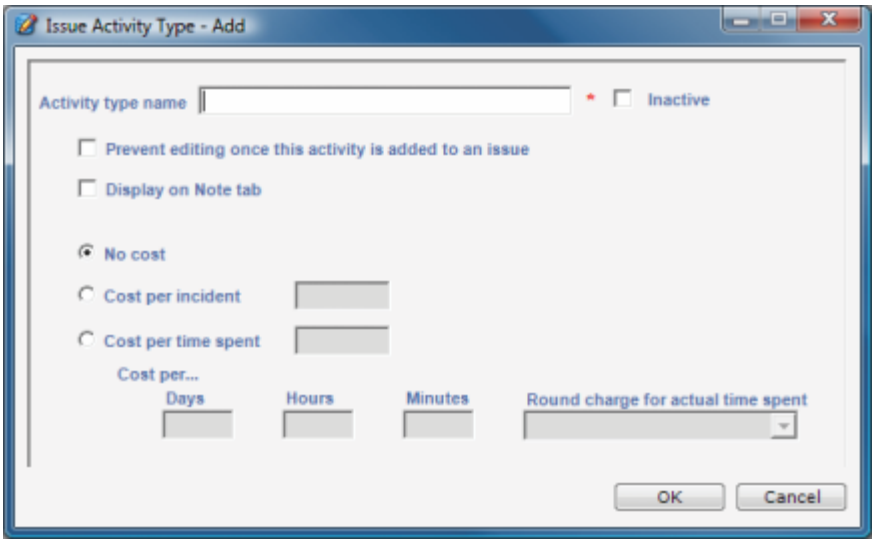

2. In the **Activity type** field, enter a descriptive name for the new activity type. This field is required.
3. A cost must be defined for your new activity type. You have three choices:
4. **No cost** – Check this radio button if there will be no cost associated with the activity type.
5. **Cost per incident** – Check this radio button if there will be one fixed cost per occurrence of this activity type. Enter this cost in the text field provided.
6. **Cost per time spent** – Check this radio button if the cost associated with this activity type will be based upon the time spent performing the activity. Enter a cost in the text field provided, then specify that cost by entering a number in the **Days**, **Hours** or **Minutes** text fields. For example, if you will be basing the cost on a rate of $25/hour, enter “25” in the **Cost per time spent** field, then enter “1” in the **Hours** field.
7. You can also round the charge for actual time spent with the drop-down menu to the right of the **Cost Per Time Spent** fields.
8. Once this activity type is used in an issue, making changes to it will potentially create confusion. To avoid this, check the check box labeled “**Prevent editing once this activity is added to an issue**”.
9. Check the “**Display on Note tab**” checkbox if you would like the activity to be entered as a note also.
10. Click the **OK** button.
11. The new activity type will now appear in the activity type list.
12. If you would like to edit or even delete an asset template at any time, use the **Edit** and **Delete** buttons in the activity type window.

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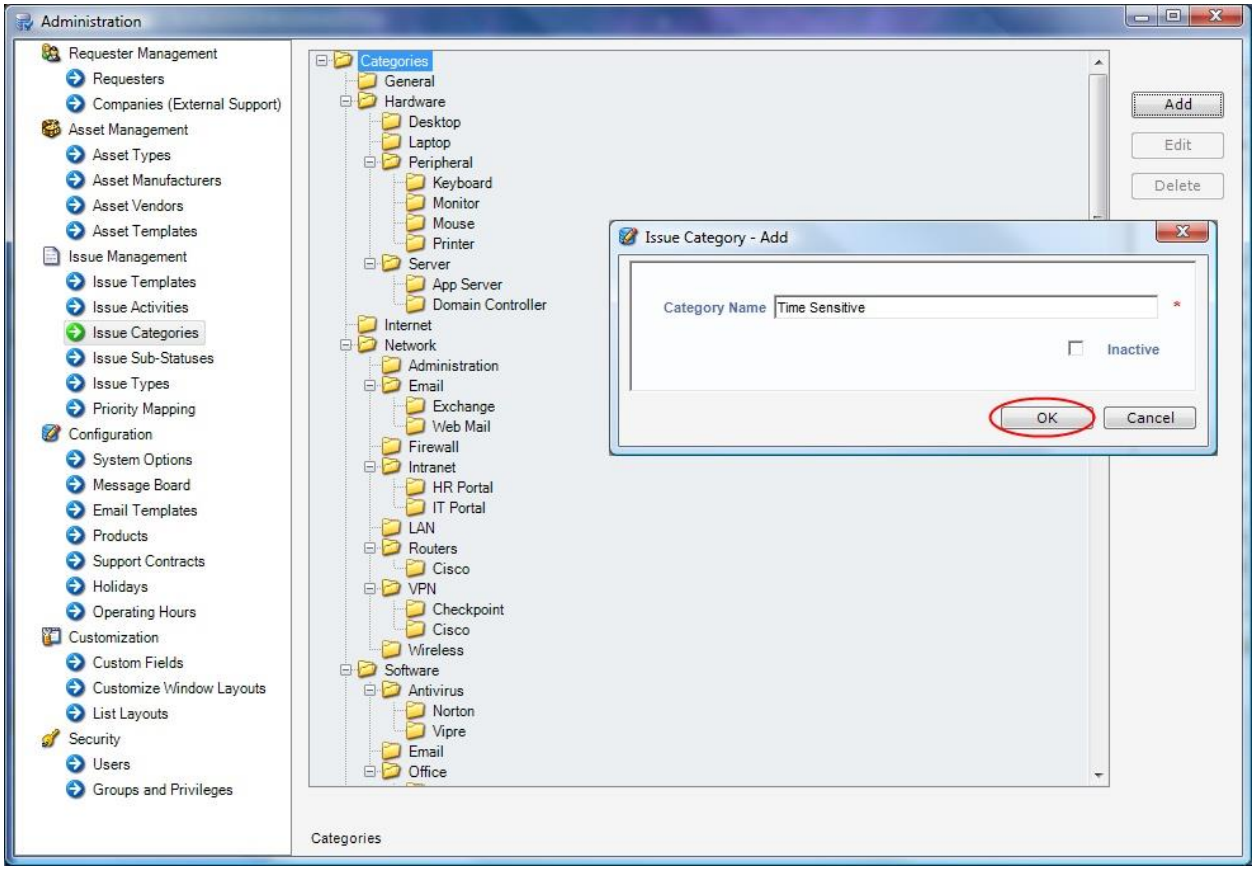
Issue Categories

Issue Management > Issue Categories

An issue category defines the general nature of an issue. In addition to defining categories, you also have the option of creating sub-categories where you may drill down up to four levels. For example, you may define a category of “Software Bug.” Under the “Software Bug” category, you may want to define sub-categories of application names.

Creating an Issue Category

1. Select a category in the list that will be the parent category for the new category. If you are creating a parent category instead, select the main **Categories** category in the list.
2. Click the **Add** button in the upper right corner of the window. This will open the Issue Category Type – Add window.
3. Enter the name of your new issue category in the **Category Name** field.
4. Click the **OK** button.



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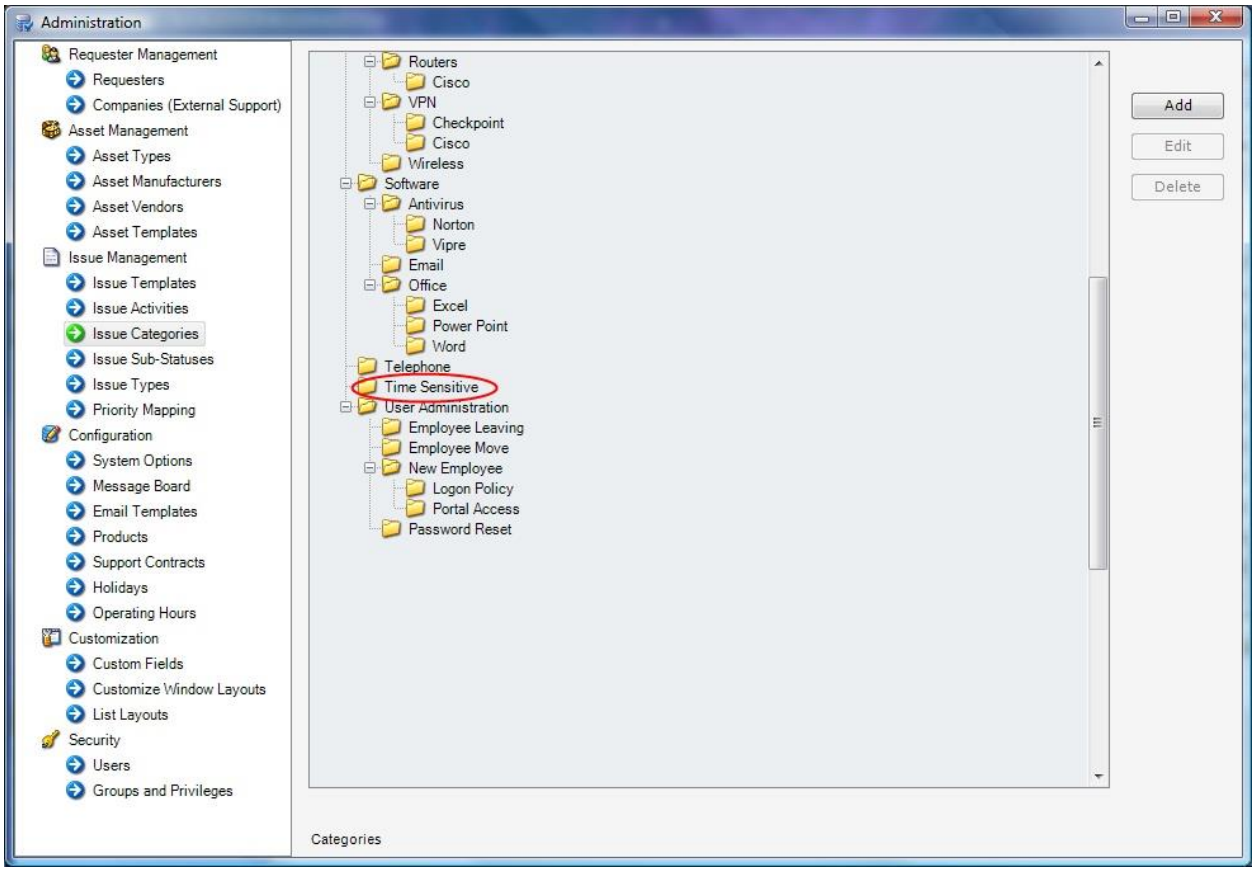
5. The new issue category will now appear in the issue category list as shown below. You can add up to four levels of categories.



6. If you would like to edit or delete an issue category at any time, use the **Edit** and **Delete** buttons in the Issue Category window.

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Issue Sub-Statuses

Issue Management > Issue Sub-Statuses

By default, Help Desk Authority is installed with four pre-defined issue statuses:

- Open
- Closed
- Pending
- Suspended

These issue statuses cannot be changed, but you are able to create sub-statuses under each of these issue statuses. You can name them anything you like to fit the operations of your help desk. Below are some examples:

Status	Possible Sub-Statuses
Open	• Research • Assigned • Call Back
Pending	• Pending user Approval • Waiting on customer • Pending QA Action

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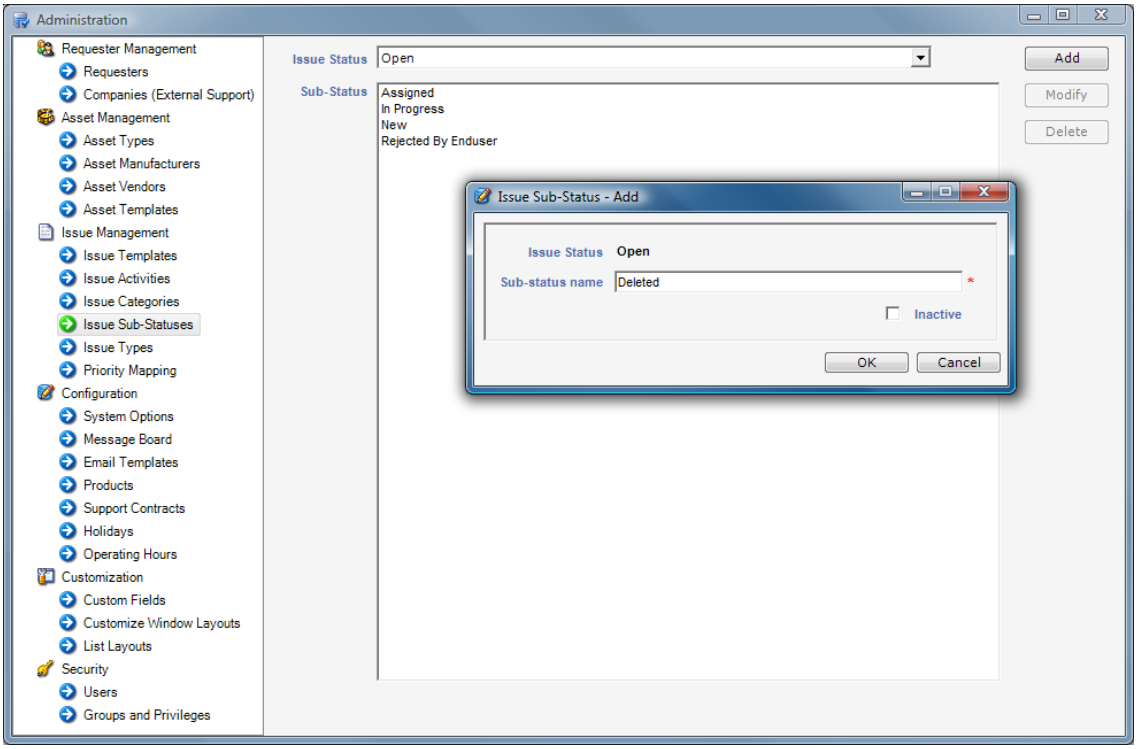
Creating an Issue Sub-Status

1. In the **Issue Status** drop-down menu, choose the issue status under which your new sub-status will fall.
2. Click the **Add** button in the upper right corner of the window. This will open the issue Sub-Status – Add window.
3. Enter the name of your new issue sub-status in the **Sub-Status** field.
4. Click the **OK** button.



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5. The new sub-status will now appear in the list under the main sub-status under which it was placed.
6. If you would like to edit or delete an issue sub-status at any time, select the sub-status and use the **Edit** or **Delete** buttons in the issue Sub-Statuses window.

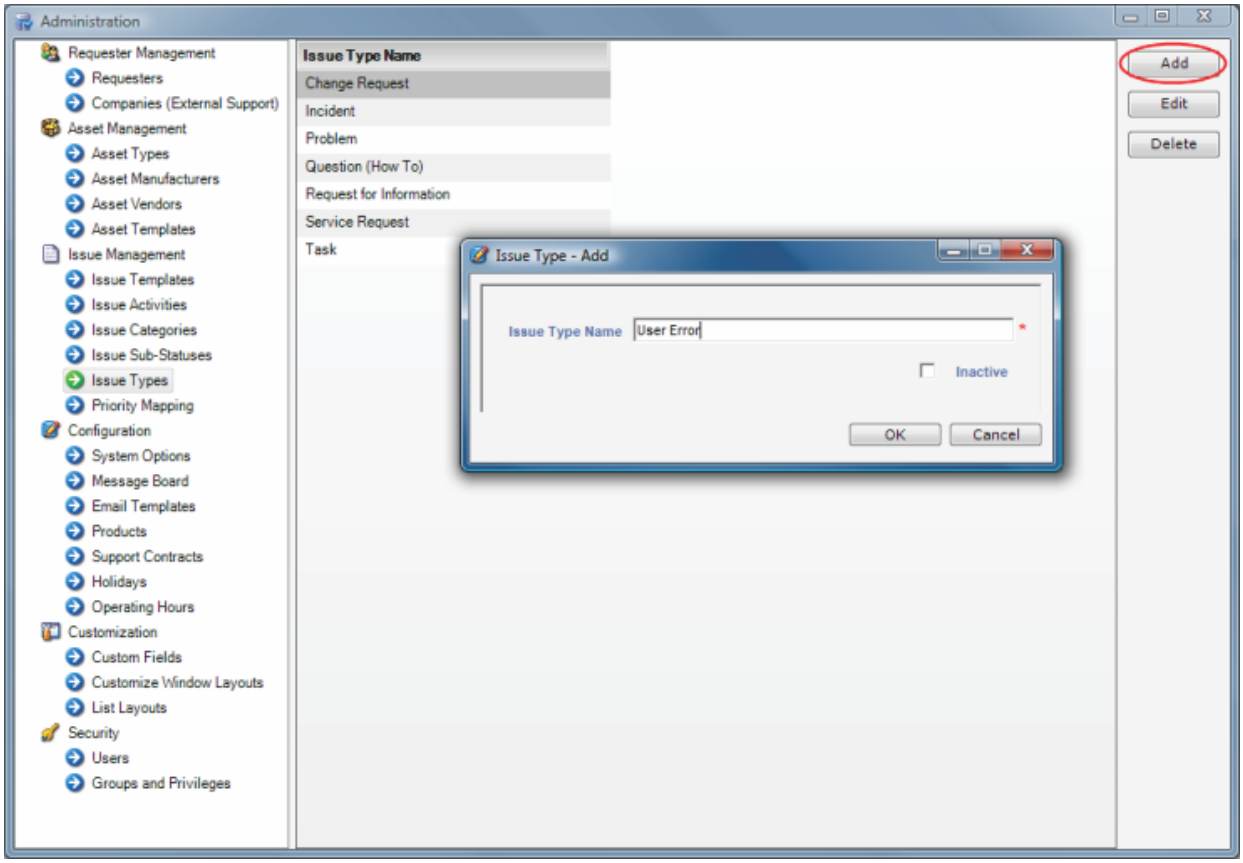
Issue Types

Issue Management > Issue Types

Issue types let your help desk create a basis for the most common types of issues that occur in your business.

Creating an Issue Type

1. Click the **Add** button in the upper right corner of the window. This will open the issue Type – Add window.
2. Enter the name of your new issue type in the **Issue Type** field.
3. Click the **OK** button.



4. The new issue type will now appear in the list under the issue Type list.
5. If you would like to edit or even delete an issue type at any time, select the issue type and use the **Edit** or **Delete** buttons in the issue Types window.

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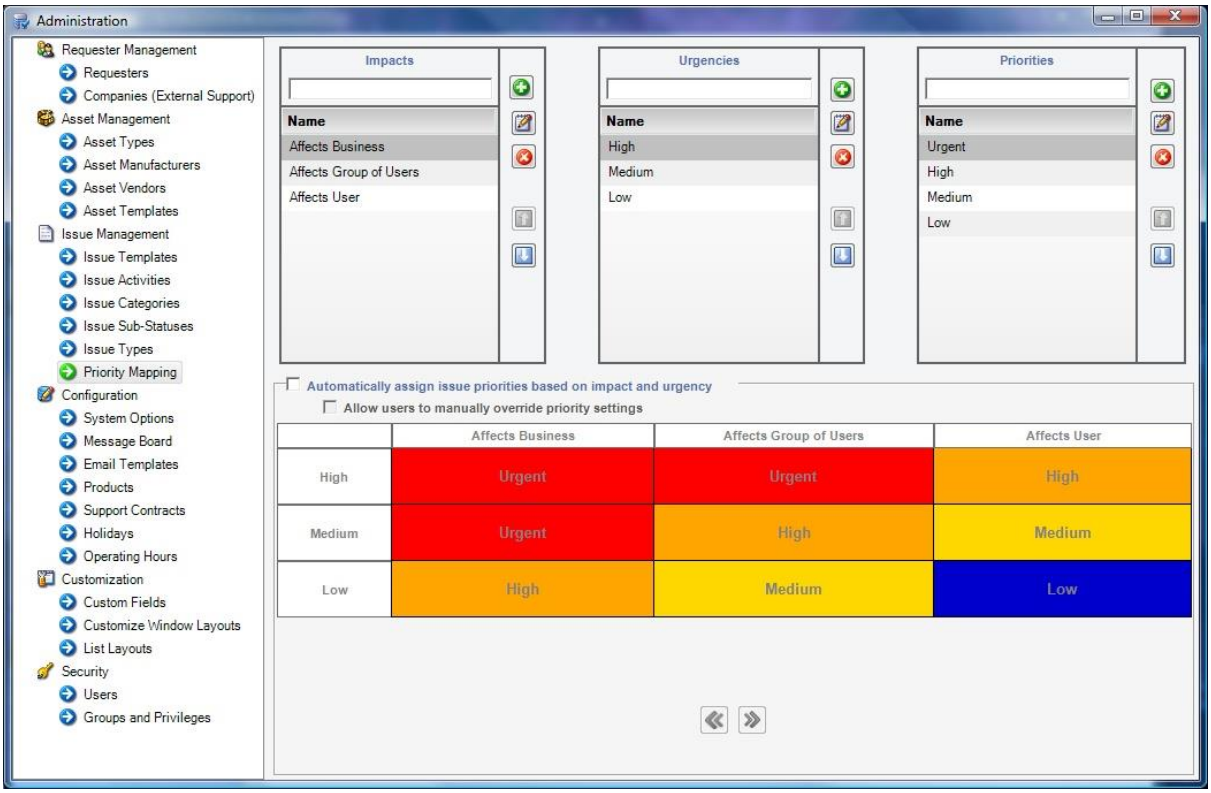
Priority Mapping

Issue Management > Priority Mapping

Priority mapping is a feature that allows users to define levels of priority—based on impact and urgency—for every phase of the Issue lifecycle. Priorities are automatically categorized on a scale from highest to lowest. The scale is graphically represented on a color-coded grid marked with Urgencies and Impacts.



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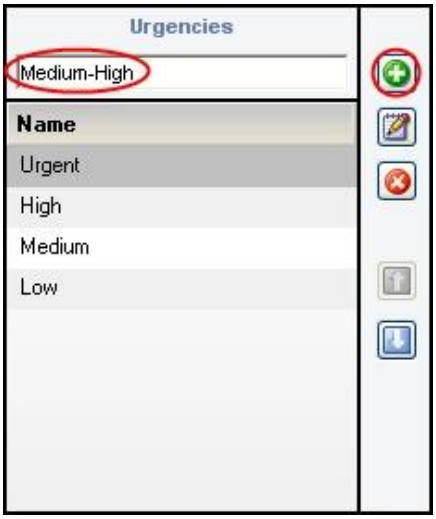
Adding an Impact

1. In the Impacts text field, enter the name of the new Impact, then click the button.
2. The Impact will now be visible in the Name column of the Impact list.

3. You can delete the Impact by selecting it, then clicking the button. When prompted for confirmation, click the **Yes** button.
4. To edit the Impact, select it, then click the button, or simply double-click the name of the Impact.
5. To change the order of your Impacts, select one and use the or keys to arrange them.

Adding an Urgency

1. In the Urgencies text field, enter the name of the new Urgency, then click the button.
2. The Urgency will now be visible in the Name column of the Urgency list.



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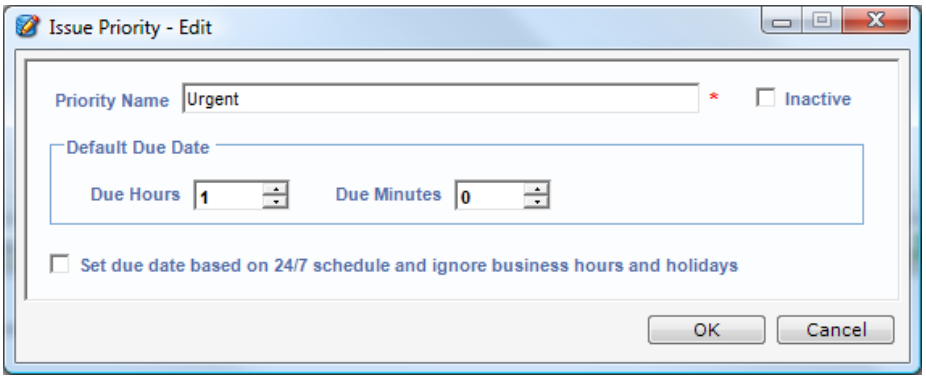
3. You can delete the Urgency by selecting it, then clicking the button. When prompted for confirmation, click the **Yes** button.
4. To edit the Urgency, select it, then click the button, or simply double-click the name of the Urgency.
5. To change the order of your Urgencies, select one and use the or keys to arrange them.

Adding a Priority

1. In the Priorities text field, enter the name of the new Priority, then click the button.
2. The Priority will now be visible in the Name column of the Priority list.

3. You can delete the Priority by selecting it, then clicking the button. When prompted for confirmation, click the **Yes** button.
4. To edit the Priority, select it, then click the button, or simply double-click the name of the Priority. Editing a Priority is different from editing an Impact or Urgency. In a Priority, not only can you edit the name, but the default due date can also be edited as shown below.



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5. To change the order of your Priorities, select one and use the or keys to arrange them.

Adjusting the Mapping Grid

To adjust Priorities up or down in the Priority Mapping grid:

1. Check the "**Automatically assign Issue Priorities based on Impact and Urgency**" checkbox. This allows for adjustments to the Priority Mapping grid. Also, if you would like to allow the user to override the Priority settings, check the checkbox labeled "**Allow users to manually override Priority settings**".

Automatically assign issue priorities based on impact and urgency
Allow users to manually override priority settings

2. Select the Priority you wish to shift up or down in importance.
3. Using the and buttons below the Priority Map, expand the selected Priority level to the appropriate Impact and Urgency levels.

Example:

In the screen shot below, the Priority "2 - High", which intersects the "Medium" Urgency and the "Affects Department" Impact, is selected.

	Affects Business	Affects Department	Affects Sales	Affects User	Affects Group
Urgent	1 - Urgent	1 - Urgent	1 - Urgent	2 - High	3 - Medium
High	1 - Urgent	1 - Urgent	2 - High	3 - Medium	3 - Medium
Medium	1 - Urgent	2 - High	3 - Medium	3 - Medium	4 - Low
Low	2 - High	3 - Medium	3 - Medium	4 - Low	4 - Low

Clicking the button after selecting the above priority will change the Priority Levels of several Impacts and Urgencies by expanding the "2 – High" Priority level to the left. Note also that this shifts the "1 – Urgent" Priority to the left, resulting in a lower Priority for some Urgency/Impact combinations.

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	Affects Business	Affects Department	Affects Sales	Affects User	Affects Group
Urgent	1 - Urgent	1 - Urgent	2 - High	2 - High	3 - Medium
High	1 - Urgent	2 - High	2 - High	3 - Medium	3 - Medium
Medium	2 - High	2 - High	3 - Medium	3 - Medium	4 - Low
Low	2 - High	3 - Medium	3 - Medium	4 - Low	4 - Low

Configuration

New in Help Desk Authority 9 is the Configuration window. We've taken many elements of the application that are configurable and put them into one handy window for easy navigation. The items in the Configuration window are as follows:

- **System Options** – Includes the most common settings for the application such as time settings and management, license information, directory settings, email set-up, field tracking and issue reporting.
- **Message Board** – Create and manage Message board messages.
- **Email Templates** – Create and manage custom email templates.
- **Products** – Manage products.
- **Support Contracts** – Create and manage support contracts.
- **Holidays** – Set and manage holidays.
- **Operating Hours** – Set and manage the operating hours of the help desk.

System Options

Configuration > **System Options**

There are seven different tabs in the System Options window. They are:

- **General** – General settings such as issue time spent, issue status change options, set-up options for HDAccess and Remote Management, and Time/Date format.
- **License** – Licensing information for the application including requester and company name, as well as the current license key in use.
- **Directories** – Settings for the individual directory folders for Attachments, Search Index and Reports.
- **Email Settings** – Sets the default settings for email related to issues including set-up of an SMTP or Outlook server.
- **Field Tracking** – Settings for generating issue activity records to track changes in select fields.
- **HDAccess Activity Types** – Use this tab to select activity types to be visible to requesters in HDAccess.
- **Issue Ticket** – Allows for the selection and creation of issue ticket reports.

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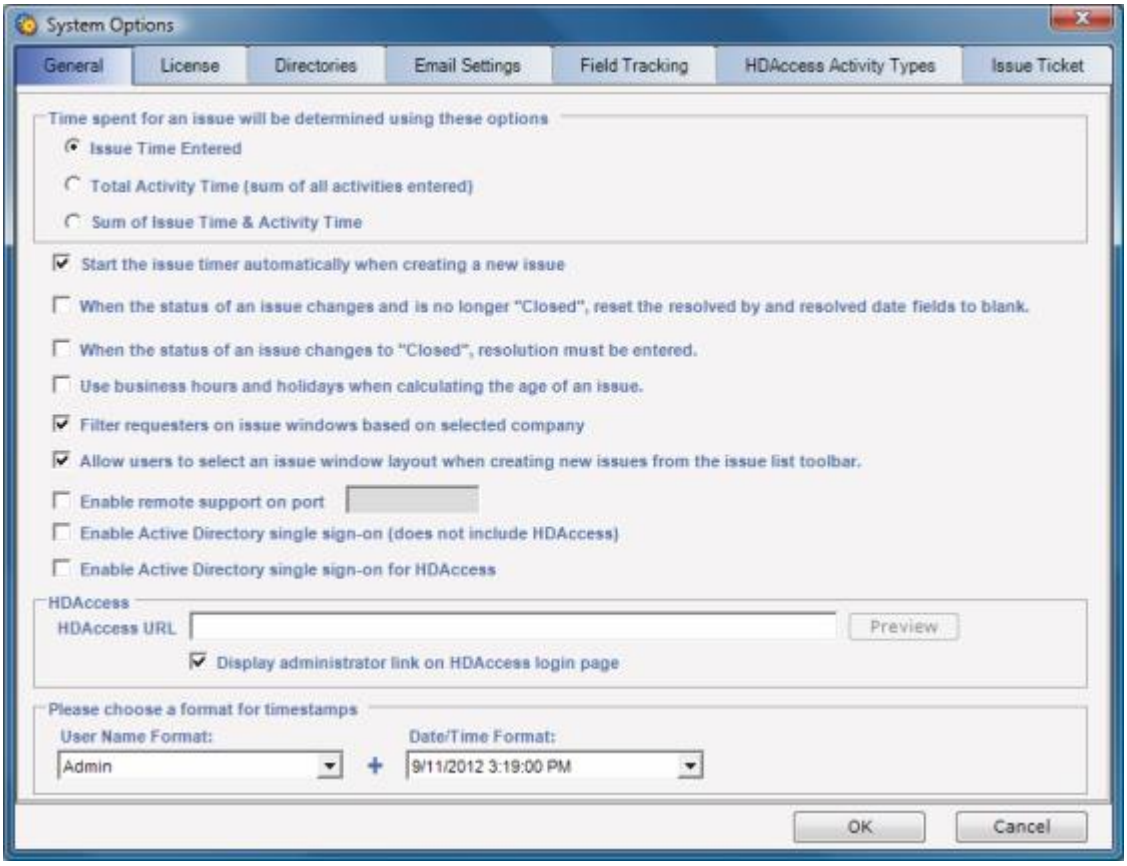
The General Tab

The General tab contains some of the more general settings in Help Desk Authority.


System Options
General
License
Directories
Email Settings
Field Tracking
HDAccess Activity Types
Issue Ticket
Time spent for an issue will be determined using these options
Issue Time Entered
Total Activity Time (sum of all activities entered)
Sum of Issue Time & Activity Time
Start the issue timer automatically when creating a new issue
When the status of an issue changes and is no longer "Closed", reset the resolved by and resolved date fields to blank.
When the status of an issue changes to "Closed", resolution must be entered.
Use business hours and holidays when calculating the age of an issue.
Filter requesters on issue windows based on selected company
Allow users to select an issue window layout when creating new issues from the issue list toolbar.
Enable remote support on port
Enable Active Directory single sign-on (does not include HDAccess)
Enable Active Directory single sign-on for HDAccess
HDAccess
HDAccess URL
Preview
Display administrator link on HDAccess login page
Please choose a format for timestamps
User Name Format:
Admin
Date/Time Format:
9/11/2012 3:19:00 PM
OK
Cancel

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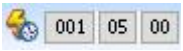
The first section of the General tab is “Time spent for an Issue will be determined by these options”. You have three options:

Option	Meaning
Issue Time Entered	Issue time is a field in the Issue window. It represents the total time spent on an issue. This option can be used in lieu of activity time. The issue timer with this option will appear like this:
Total Activity Time (sum of all Activities entered)	As activities are entered, each one will have a time assigned to it by the user. Using this option totals the time entered for all activities. The issue timer with this option will appear like this: 
Sum of Issue Time and Activity Time	This option will use the sum of both issue time entered and total activity time. The issue timer with this option will look like this:

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The next section of the General tab is a list of checkboxes, all of which are covered below:

Option	Result
Start the issue timer automatically when creating a new issue	Starts the issue timer whenever a new issue is opened.
When the status of an issue changes and the issue no longer has the status of "Closed", reset the Resolved By and Resolved Date fields to blank	If an issue status is changed from "Closed", the **Resolved By** and **Resolved Date** fields are no longer valid because the issue is not considered closed. This option resets those fields when the status changes from "Closed".
When the status of an issue changes to "Closed", resolution must be entered	Checking this box makes the **Resolution** field a required field when an issue status is "Closed".
Use business hours and holidays when calculating the age of an issue	Selecting this option will include only normal business hours and holidays as defined by the user when determining the age of an issue.
Filter requesters on issue windows based on selected company	This option will display requesters in the Issue window grouped by the selected company.
Allow users to select an issue window layout when creating new issues from the issue list toolbar	Enables users to create new issue window layouts when creating a new issue from the issue list toolbar.
Enable remote support on Port:	Enables Desktop Authority Remote Management on the port entered.
Enable Active Directory single sign-on (Does not include HDAccess)	Enables Active Directory Single Sign-on, but does not include HDAccess.
Enable Active Directory single sign-on for HDAccess	Enables Active Directory Single Sign for HDAccess.

The next section in the General tab is HDAccess.

In the **HDAccess URL** field, enter the URL for your HDAccess home page.

In the last section of the General tab, you can choose a format for timestamps.

1. Select a user name format in the **User Name Format** drop-down menu.
2. Select a date/time format in the **Date/Time Format** drop-down menu.

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The License Tab

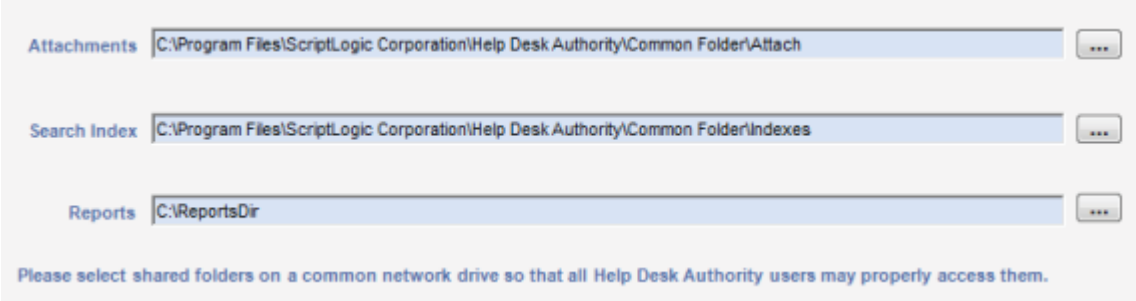
This tab holds the requester, company and license information for Help Desk Authority.

1. Make sure the "**Unlock to Edit**" checkbox is checked if you wish to edit the fields.
2. Enter the requester name in the **Requester** field.
3. Enter the company name in the **Company** field.
4. Enter the license key in the **License Key** field.
5. To Import a license key, click the **Import** button and browse to the correct .ini file containing your license key data.
6. To validate your license key, click the **Validate** button. If your key is valid, you will receive the following pop-up message.

7. Click the **OK** button.
8. To reset all fields, click the **Reset** button.

The Directories Tab

The Directories tab is used for setting the directories for Attachments, Search Index and Reports.


Attachments
C:\Program Files\ScriptLogic Corporation\Help Desk Authority\Common Folder\Attach
Search Index
C:\Program Files\ScriptLogic Corporation\Help Desk Authority\Common Folder\Indexes
Reports
C:\ReportsDir
Please select shared folders on a common network drive so that all Help Desk Authority users may properly access them.

For each of the three fields, browse to the folder location that you would like to use. When finished, click the **Save** button.

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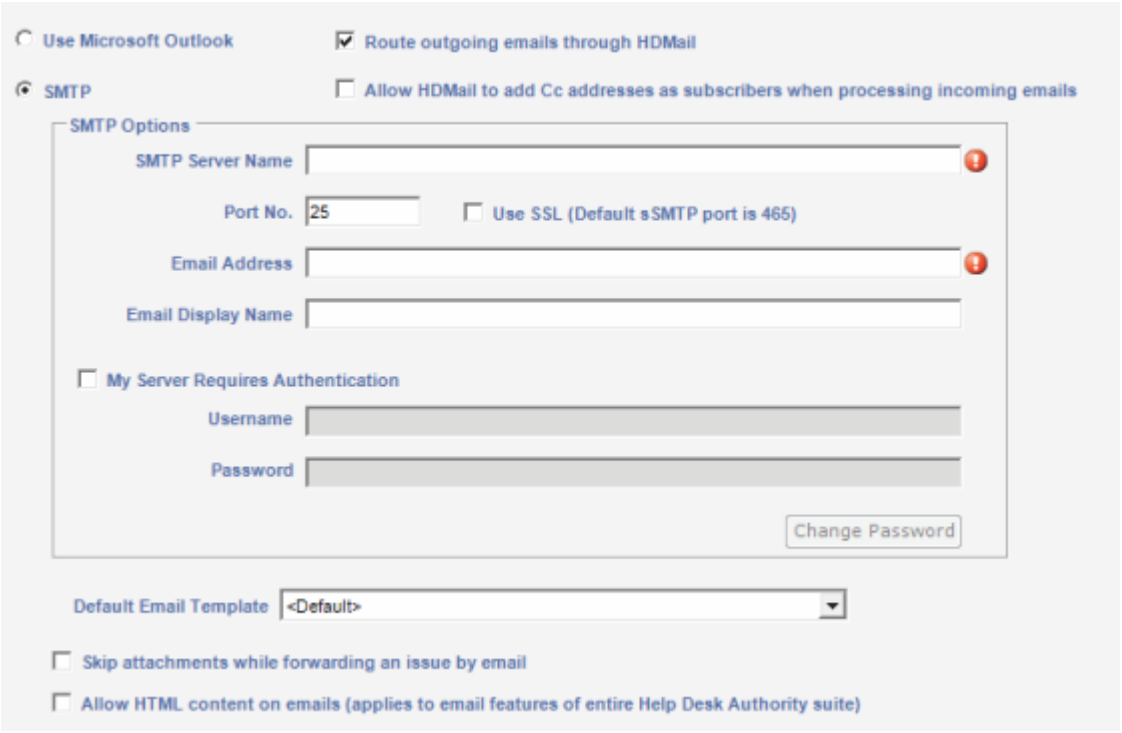
The Email Settings Tab

The Email Settings tab contains the fields for configuring your email with Help Desk Authority.


Use Microsoft Outlook
Route outgoing emails through HDMail
SMTP
Allow HDMail to add Cc addresses as subscribers when processing incoming emails
SMTP Options
SMTP Server Name
Port No.
25
Use SSL (Default sSMTP port is 465)
Email Address
Email Display Name
My Server Requires Authentication
Username
Password
Change Password
Default Email Template
<Default>
Skip attachments while forwarding an issue by email
Allow HTML content on emails (applies to email features of entire Help Desk Authority suite)

1. Select either the "**Use Microsoft Outlook**" or "**SMTP**" radio buttons depending on your preferred configuration. Note that if you choose **SMTP**, the SMTP options will need to be completed, and if you choose **Outlook**, those fields are locked.
2. If you would like to route your outgoing email through HDMail, check the "**Route outgoing email through HDMail**" checkbox.
3. If you checked the checkbox in Step 2 above, you also have the option to "**Allow HDMail to add Cc addresses as subscribers when processing incoming emails**" by checking the second checkbox.
4. If you have chosen to use SMTP, there are some required fields in the SMTP Options section. If not, skip to Step 11.
5. Enter the SMTP Server Name in the **SMTP Server Name** field. This is required.
6. Enter the port number in the **Port No.** field. This is also required.
7. Check the "**Use SSL (Default sSMTP port is 465)**" checkbox if you wish to use SSL.
8. Enter the email address in the **Email Address** field. This field is required.
9. Enter an email display name in the **Email Display Name** field if desired.
10. If your email server requires authentication, check the "**My Server Requires Authentication**" checkbox, and then enter the user name and password in the appropriate fields.
11. If you would like to forward your issues by email without using attachments, check the "**Skip attachments while forwarding an issue by email**" checkbox.
12. In the **Default Email Template** drop-down menu, select a template you would like to use as the default for your outgoing mail.

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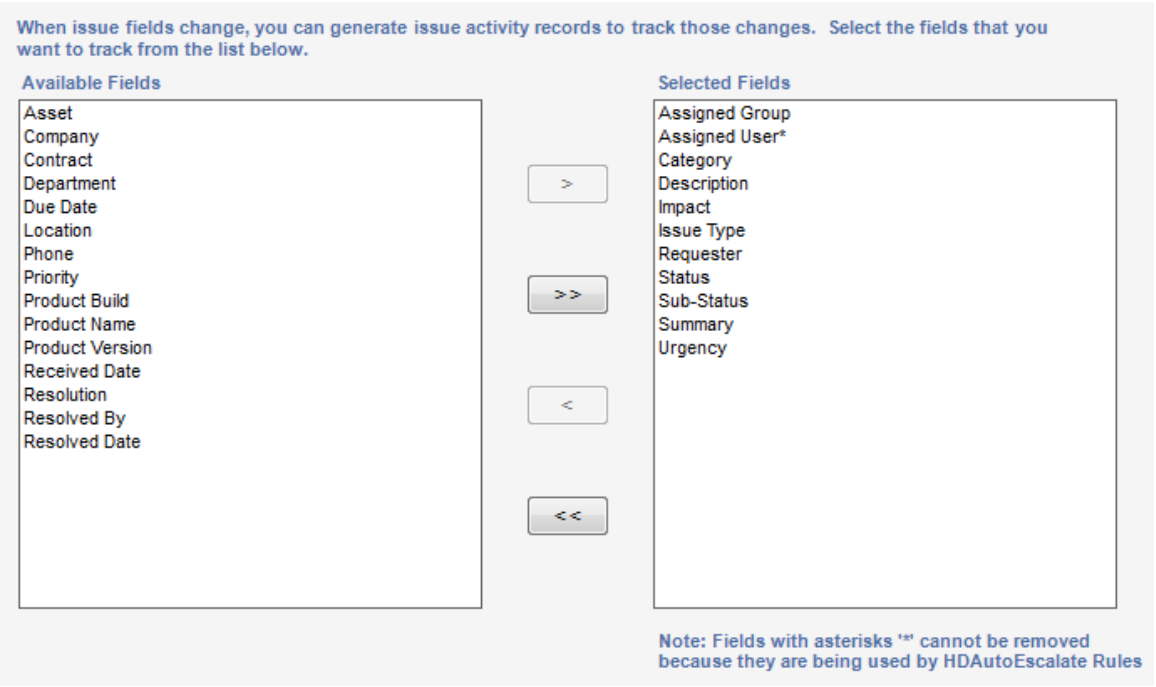
The Field Tracking Tab

Field tracking is used to generate activities within an issue based upon changing values in a particular field. For every field selected for tracking, a separate activity will be created each time that field changes value.

For example, in the Selected Fields list below (in the right pane), there are eleven fields selected for tracking. If each one of these fields had a change in value within an issue, eleven new activities would be created within that issue.



To move fields from the Available pane to the Selected pane:

1. Select a field from the **Available Fields** list.
2. Click the > button to move the selected field to the **Selected Fields** list.
3. To move a selected field back to the **Available Fields** list, select the field and click the < button.
4. To move *all* fields from one list to the other with one click, use the >> and << buttons.

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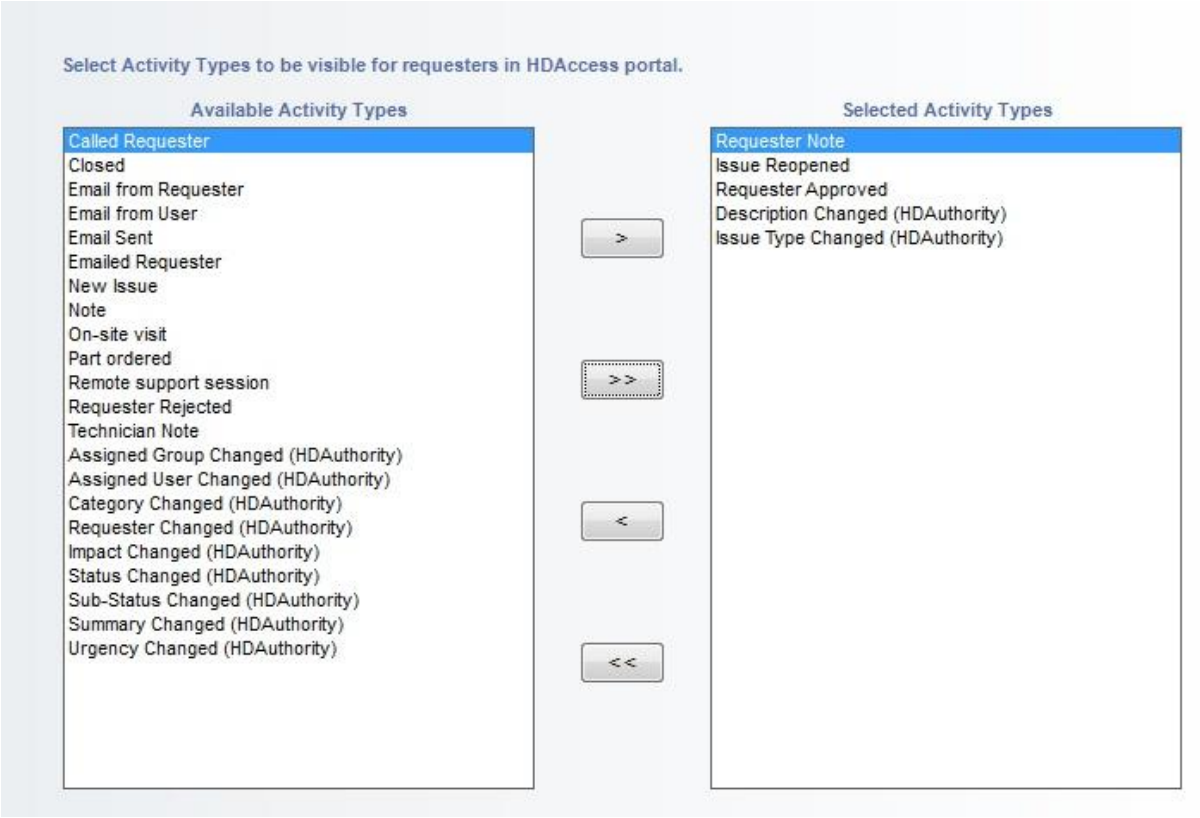
HDAccess Activity Types Tab

In the HDAccess Activity Types tab you will select, from a list of available activity types, the activity types you would like to be available for user dos the HDAccess portal.

To move activity types from the “Available” list to the “Selected” list, simply highlight an activity type and use the arrow keys to move it from one list to the other. Use the double-arrow keys to move the entire group of activity types.



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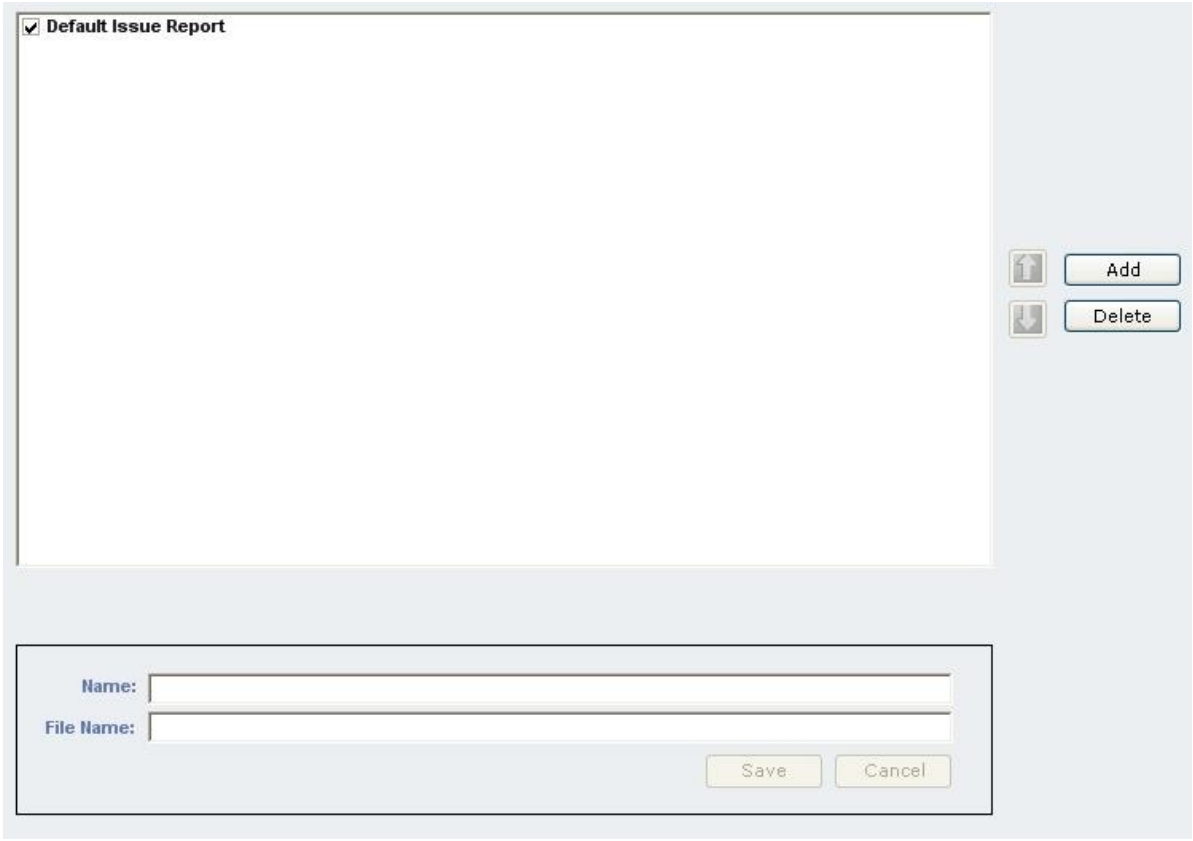
The Issue Ticket Tab

In the Issue Ticket tab, it is possible to add new report templates for issue reports. When a new report is added, it will appear in the **Issue Ticket** drop-down menu of the Select Issue Ticket window. You can also change the order of the reports and delete reports from this tab.



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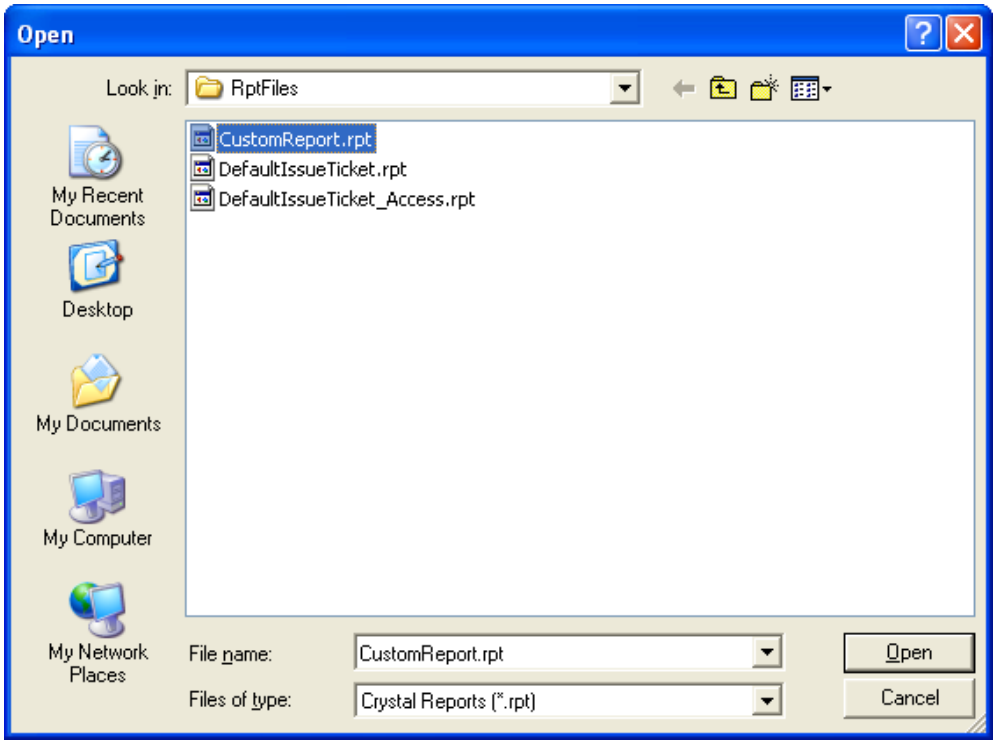
To create a new issue ticket report:

1. Click the **Add** button. This will open the Report directory (as defined in the Directories tab covered earlier in this section) as shown below.



2. Select the report you would like to add.
3. Click the **Open** button.
4. In the **Name** field below the issue Report list, enter a name for the new report. (Note that the file name of the report is already populating the **File Name** field.)
5. Click the **Save** button.
6. The new report will now be available in the issue report list for selection.
7. To arrange the way your report list appears in the **Issue Ticket** drop-down menu of the Select Issue Ticket window, select a report in the list and move it up or down in the list using the and buttons.
8. To delete a report, select the report and click the **Delete** button.

If all options you wish to set in the System Options window have been completed, click the **OK** button to save them.

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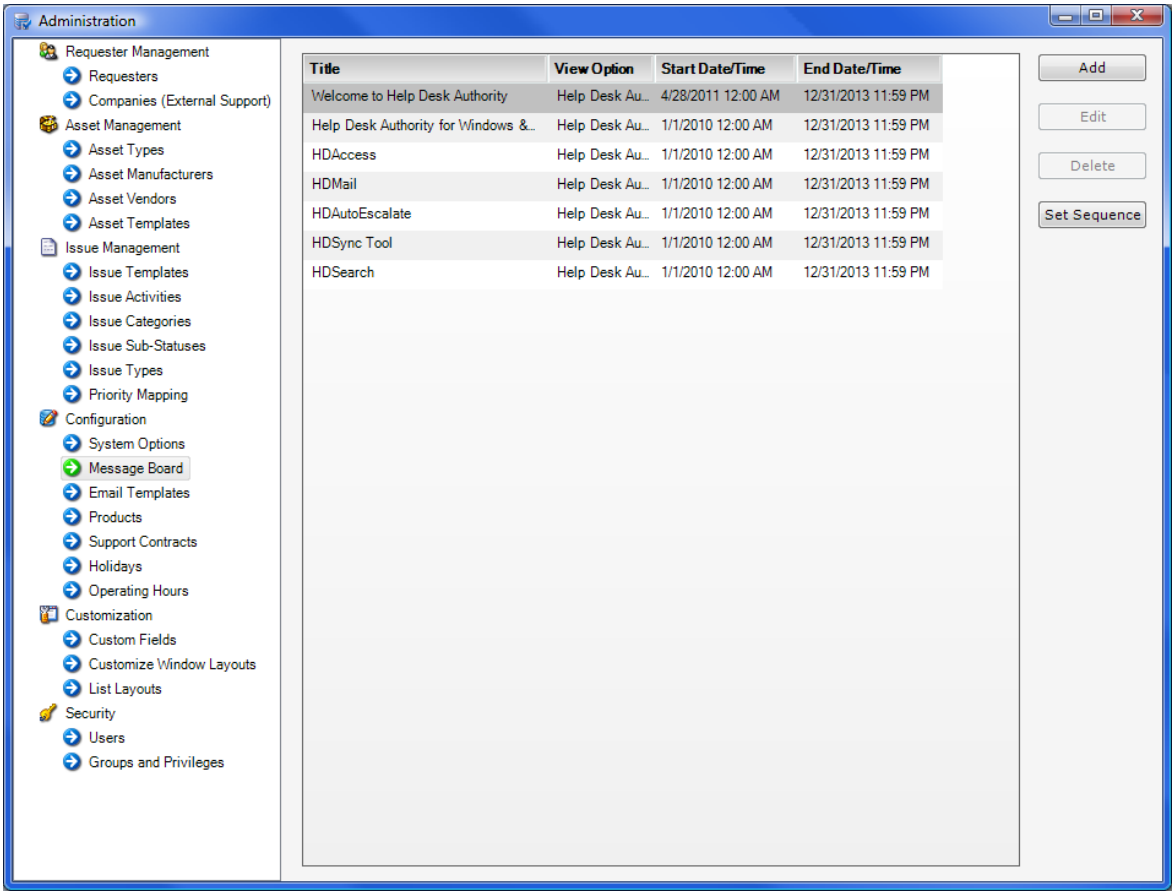
The Message Board

Configuration > **Message Board**

In the Message Board window, you can add, edit, delete and set the sequence of messages that will appear in the Help Desk Authority Message Board, located in the Top Pane of the Dashboard. You can edit the Message Board to display any important messages that all Help Desk Authority users and HDAccess customers should see. A good example would be a bulletin to notify users of a scheduled system downtime. Multiple Headlines can be displayed, and the display sequence can also be controlled.

The buttons to the left of the Message Board can be used to stop or start the automatic scrolling of the Message Board messages (center button), or to view the previous message (left button) or the next message (right button) in the sequence.



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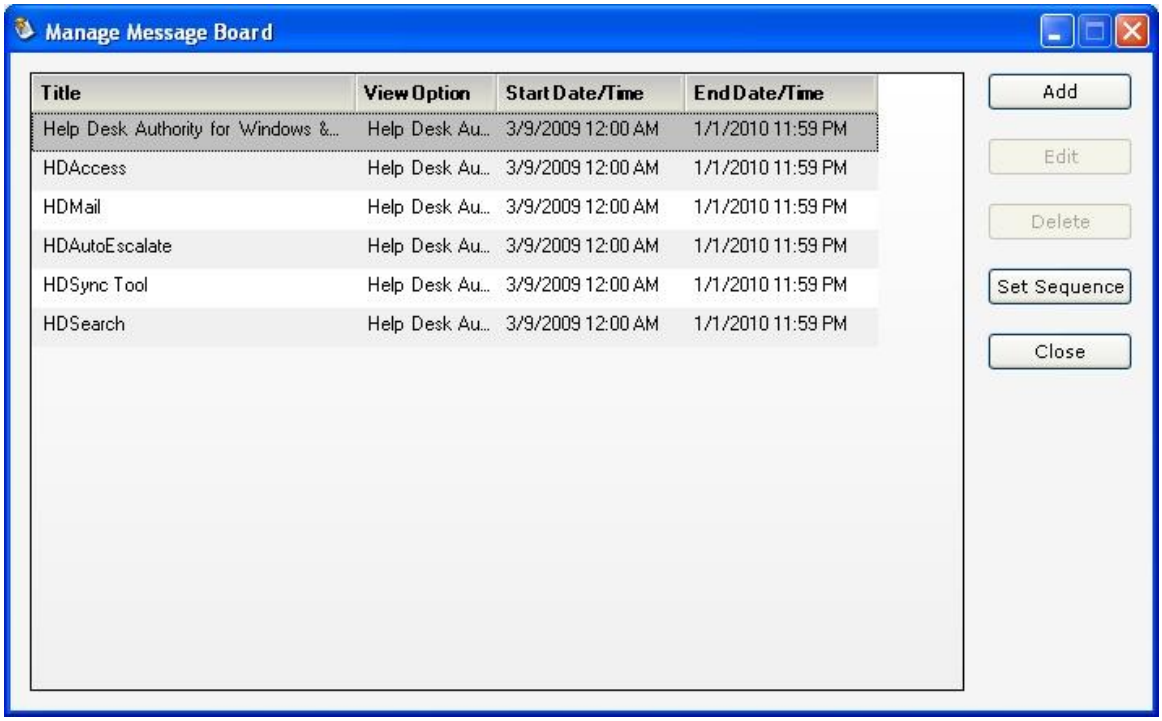
Note that there are two ways to get to this Message Board information. The second way is from the Tools menu by selecting **Tools** > **Message Board** > **Manage Message Board**. This opens the Manage Message Board window. This window mirrors the view under Administration shown below. The functionality between the two views is identical.



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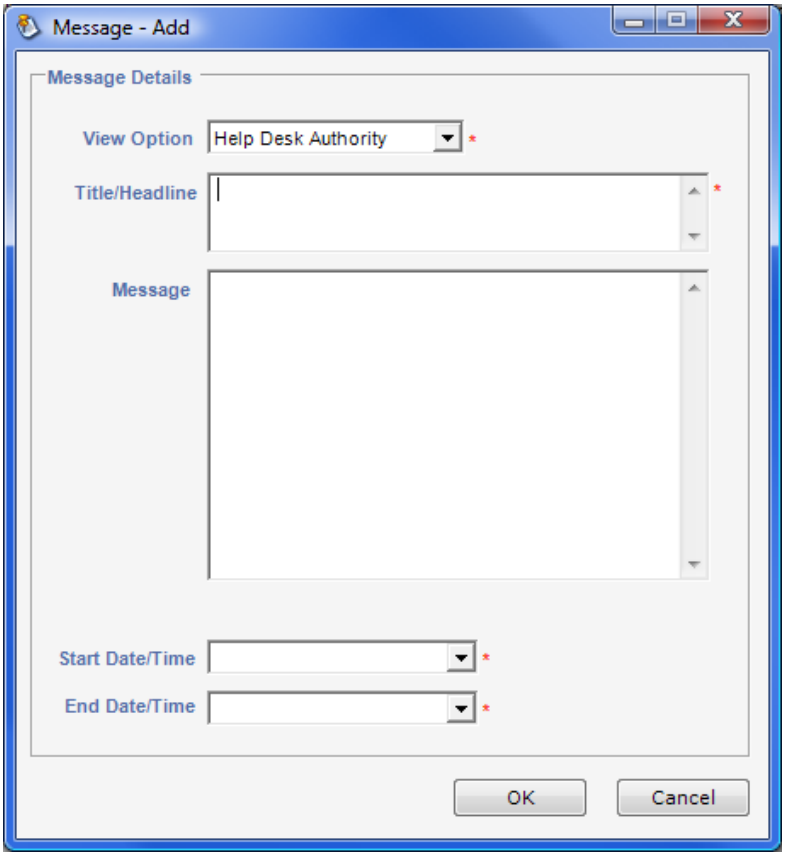
Creating Headlines and Messages in the Message Board

1. Click the **Add** button to the right of the headline list. This will open the Message – Add window.



2. In the **View Option** drop-down menu, select Help Desk Authority, HDAccess or Both, depending upon which users you would like to see the message.
3. In the **Title/Headline** text field, enter a unique title for the message. Note that this will also be the headline that is displayed in the Message board. This is a required field.
4. In the **Message** text field, enter the details of the message.
5. In the **Start Date/Time** and **End Date/Time** drop-down menus, select the start and end dates of the message to set the duration. These fields are required.
6. Click the **OK** button to save the message and headline.

Although the message has been created and saved, it must still be activated and set in sequence before it will appear in the rotation of messages in the Message Board. Be sure to continue with the following steps to complete the process.

7. Click the **Set Sequence** button in the Message Board window. The Set Sequence window is displayed as shown in Step 8.

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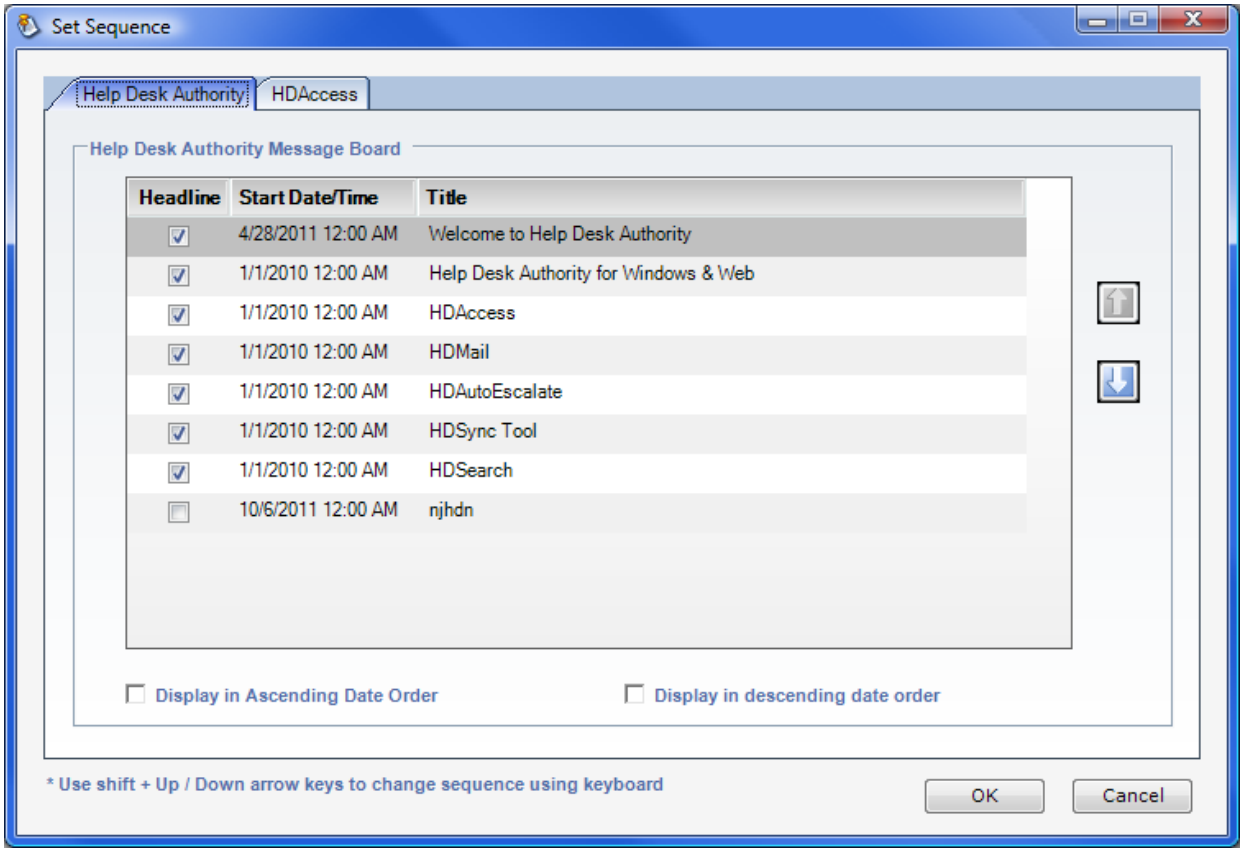
8. Select the Help Desk Authority tab if the message is to be displayed in Help Desk Authority.



9. Check the checkbox in the **Headline** column to activate the message.
10. If there are multiple messages in the window, select the new message by clicking anywhere in the row, then use the up and down arrow buttons to the right of the message list to set the sequence. Note that the messages can be set to display in ascending or descending order by checking the appropriate checkbox located under the message list.
11. If the message is to be displayed in HDAccess, select the HDAccess tab and repeat Steps 9 and 10.
12. When finished, click the **OK** button to save the sequence.
13. In the Manage Message window, click the **Close** button.
14. To edit an existing message, select the message and click the **Edit** button. This will open the Message – Edit window. Click the **OK** button when finished.
15. To delete a message, select the message and click the **Delete** button.

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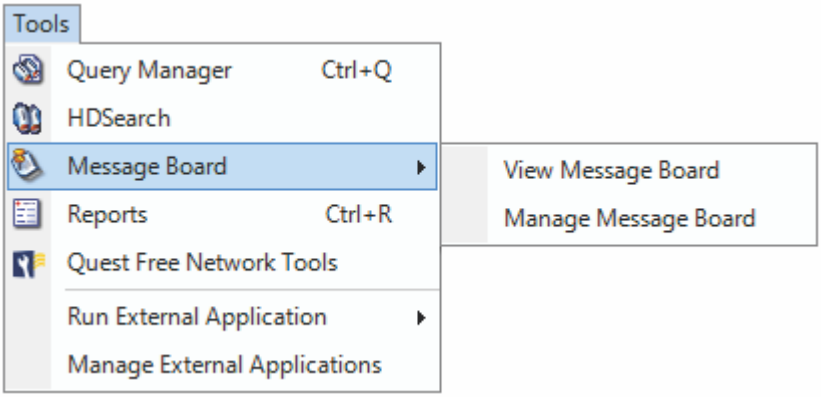
Viewing the Message Board Details

As explained in the previous section, you can create detailed messages to complete the headlines displayed in the Message Board. To view the Message Board details, take any one of the following steps:

- Move the cursor over any message that is displayed in the Message Board. A **Read the Message** link will appear. Click the **Read the Message** link to open the Message Board Details window.

- From the Main Menu, select **Tool**s > **Message Board** > **View Message Board**



- From the Toolbar, select **Message Board** > **View Message Board**

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The Message Board details will be displayed in the Message Board as shown below.

Message Board
Message Board
Jul 26, 2010 Help Desk Authority Version 9.1 Coming Soon!
ScriptLogic is proud to announce the upcoming release of Help Desk Authority 9.1. Packed full of new features and updates, version 9.1 will streamline your business even more than before!

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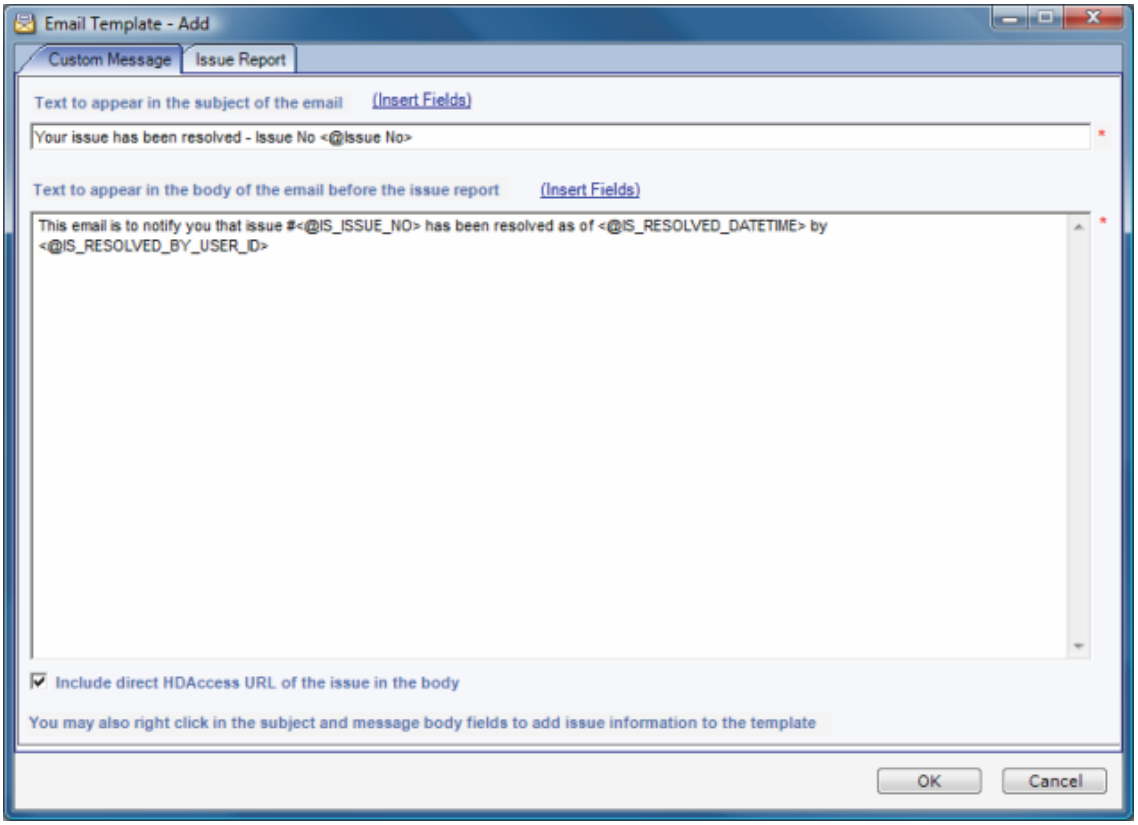
Email Templates

Configuration > **Email Templates**

Email templates can be used to save time that would ordinarily be spent on repetitive tasks, such as notification emails for certain activities occurring in an issue. Email templates can contain text and field values from issues.

Creating an Email Template

1. Click the **Add** button in the upper-right corner of the Email Templates window. This opens the Email Template – Add window.
2. There are two tabs in the Email Template – Add window. Select the Custom Message tab.
3. Enter the email subject for your template in the "**Text to appear in "Subject" area of notification e-mail**" text field.
4. If you would like to include the issue number in the subject of the email, check the "**Include Issue No. in the subject**" checkbox .
5. In the large text field, enter the text that will make up the body of the email. If you would like to use field data from the issue within your email, follow the steps below:
6. Click the **Insert Field** button or right-click anywhere in the large text field.
7. Select the field you would like to include from the pop-up menu.
8. Repeat these steps for any field data you would like to insert in your template.
9. If you would like to include the URL of the issue in HDAccess in the email, check the "**Include direct HDAccess URL of current Issue in the body**" checkbox.



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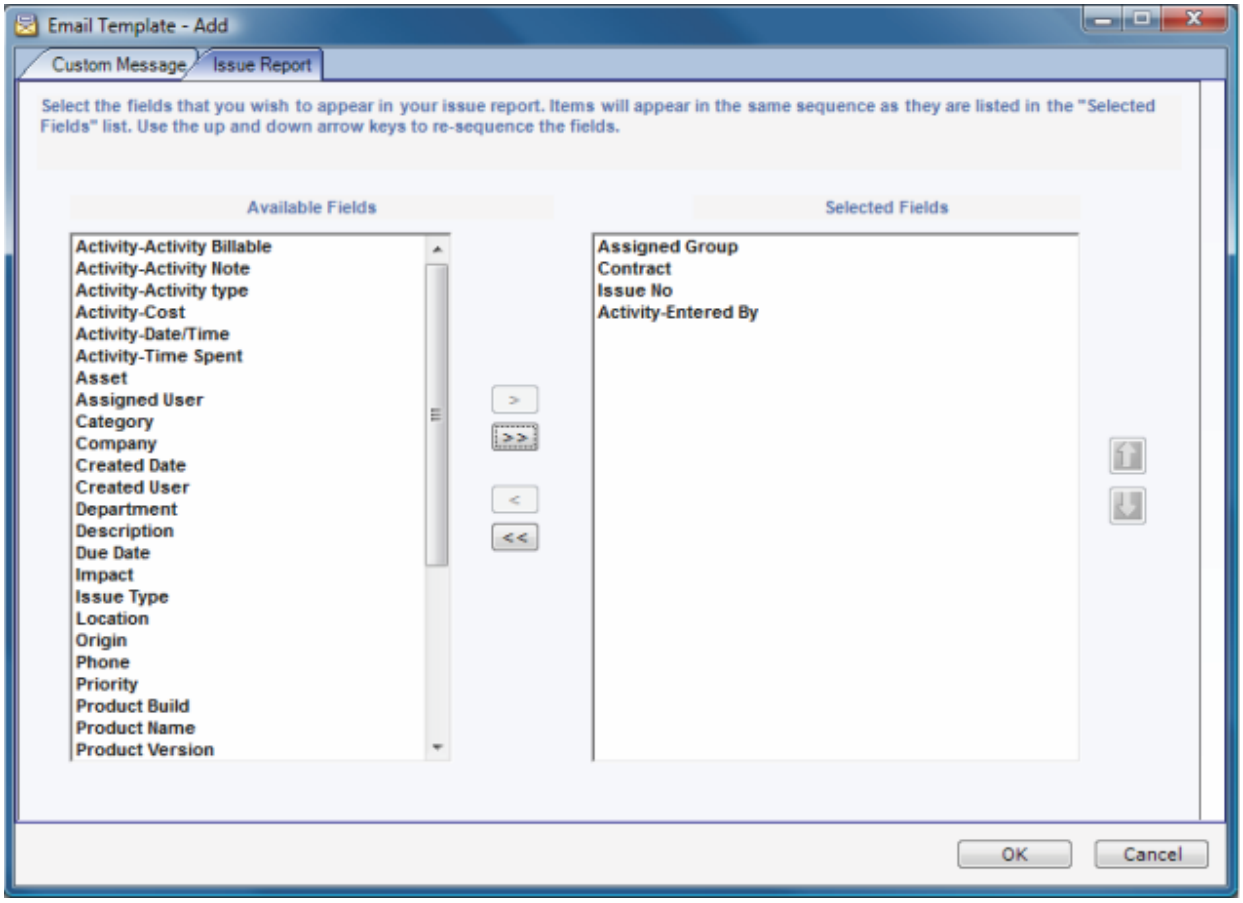
10. If you would like to add additional issue information at the end of the email, select the Issue Report tab and follow the instructions below.
11. In the **Available Fields** list in the left pane, select the fields you would like to present in the email, and use the arrow buttons to move them to the Selected Fields list.
12. Use the up and down arrow buttons to order the selected fields.



13. When you have finished creating the email template, click the **OK** button.
14. The email template will now be visible in the Template Name list. From here, you can edit an email template by selecting the template and clicking the **Edit** button, or you can delete a template by selecting it and clicking the **Delete** button.

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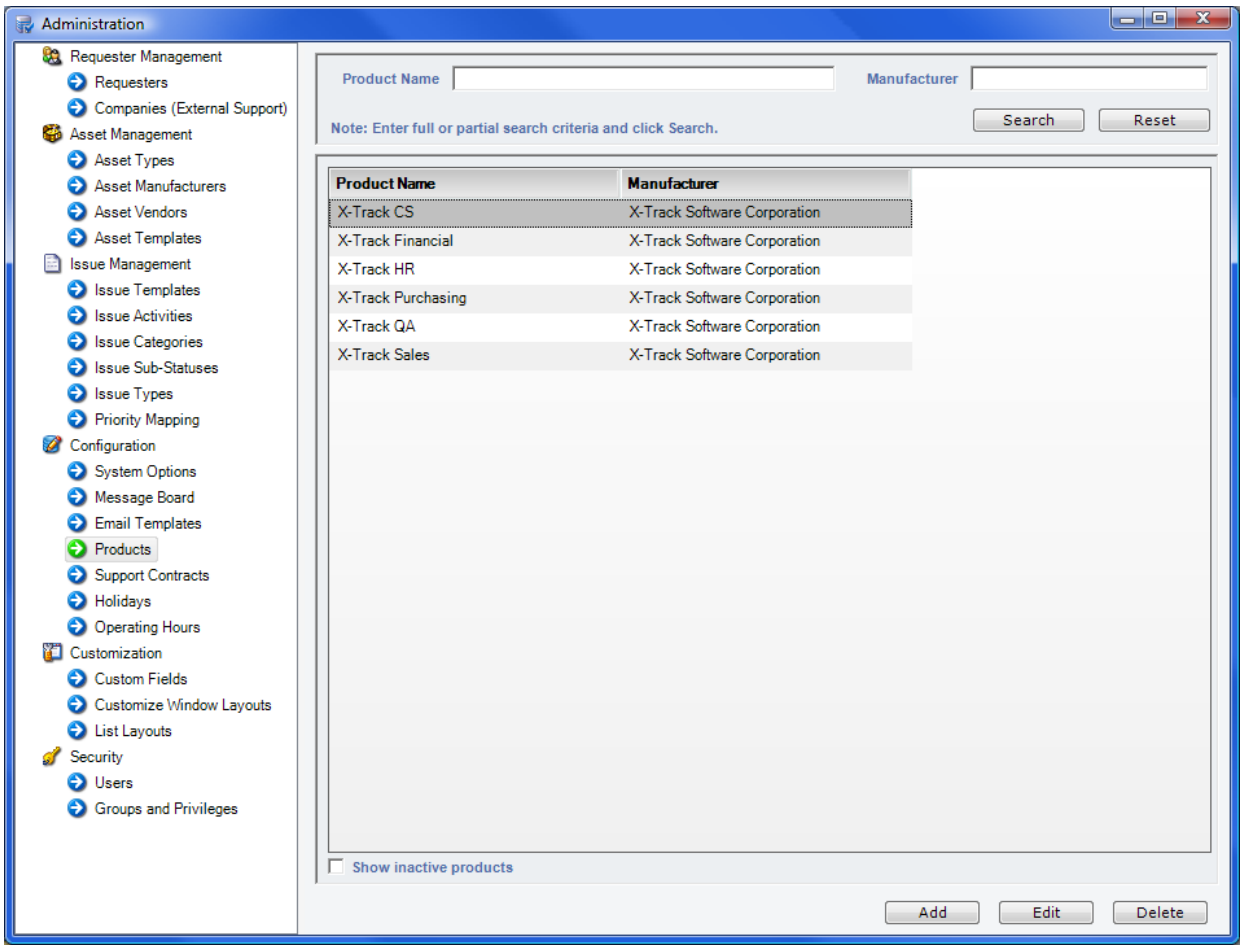
Products

Configuration > **Products**

After defining products in Help Desk Authority, they can then be linked to companies that purchase them or to individual requesters who you service independently from a company. Products can also be linked to issues when your requesters call into your help desk.

The Products window contains a search function to search for products, a product list, and the ability to add, edit or delete products.



Searching Products

To search for a product, do one of the following:

1. Enter the name of the product you are searching for in the **Product Name** field, or enter the name of the manufacturer in the **Manufacturer** field. To narrow your search, you can enter a value in both of these fields.
2. Click the **Search** button.

OR

3. Without entering data into the **Product Name** or **Manufacturer** fields, simply click the **Search** button. This will present the entire product list.

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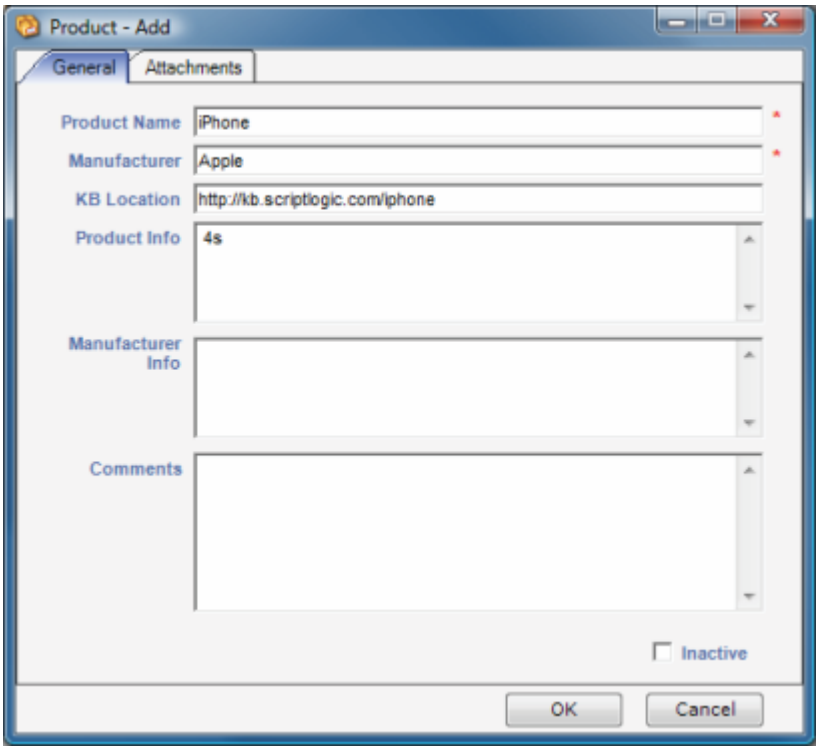
Adding, Editing and Deleting a Product

To add a product:

1. Click the **Add** button. This will open the Product – Add window.
2. Select the General tab.
3. Enter the name of the product in the **Product Name** field. This field is required.
4. Enter the manufacturer name in the **Manufacturer** field. This field is required.
5. In the **KB Location** field, enter the URL of the Knowledge Base article for this product if one exists.
6. Under **Product Info**, enter any pertinent information regarding the product.
7. Under **Manufacturer Info**, enter any pertinent information regarding the manufacturer.
8. Enter any necessary comments in the **Comment** field.
9. If you would like to attach a file or files to the product, select the Attachments tab.
10. From this tab, you can attach a file, a URL, or anything on your clipboard by using the appropriate button. You can also open or delete an attachment.
11. Click the **OK** button when you are finished creating the product.



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Support Contracts

Configuration > **Support Contracts**

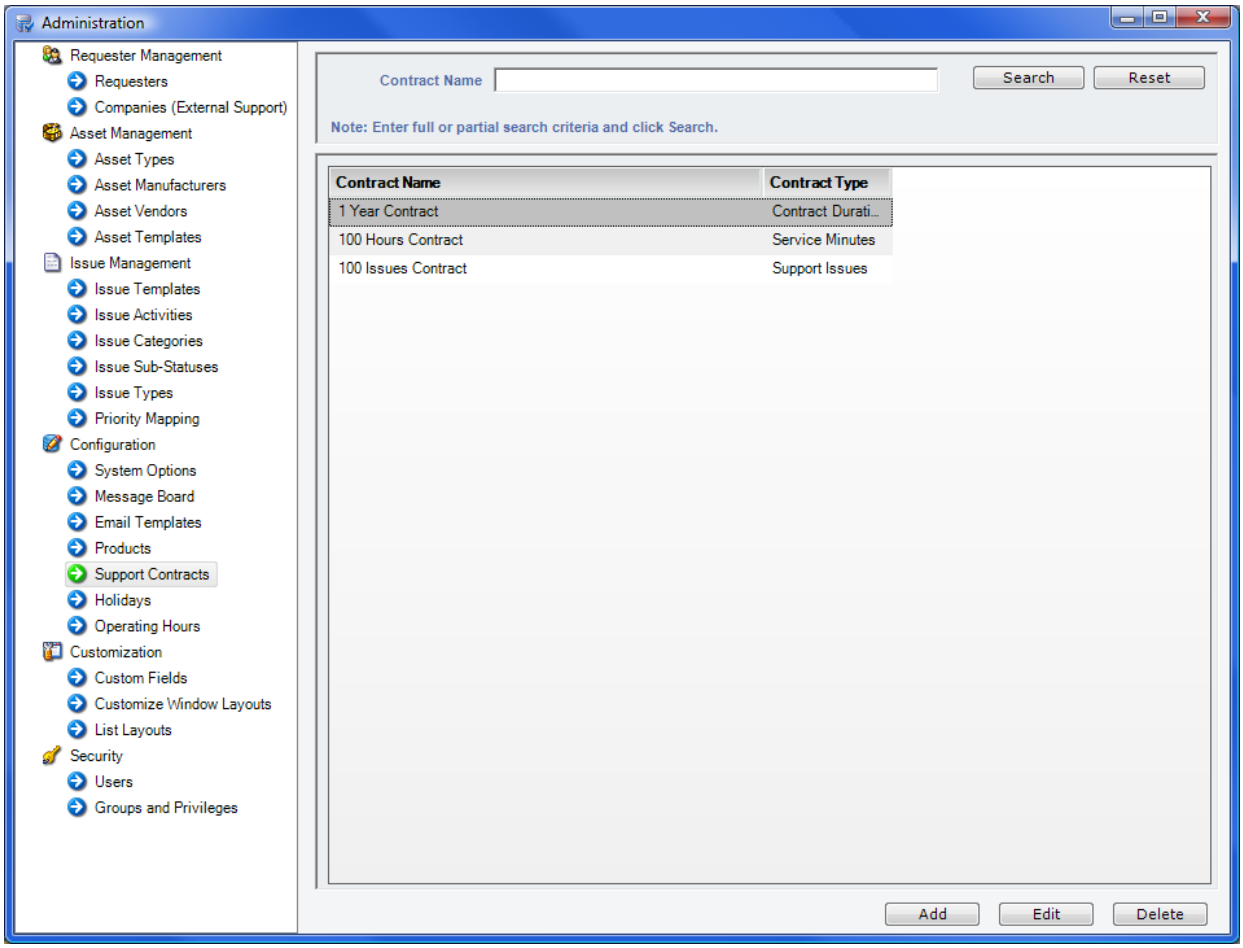
In Help Desk Authority, support contracts are the service agreement terms that you set up with your customers for supporting the products or services that you sell to them.

After defining your support contracts in Help Desk Authority, they can then be linked to companies that purchase your products and services or to individual customers who you service independently from a company. Support contracts can also be linked to issues when your customers call into your Help Desk Authority.

You can choose from support contracts based on:

- Duration – Usually an annual agreement.
- Service minutes – Contract is based upon hours/minutes used.
- Support issues – Contract is based upon a set number of issues.

In the Support Contracts window, you can search for a support contract. You can also add, edit and delete support contracts.



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Searching Support Contracts

1. Enter the name of the support contract you are searching for in the **Contract Name** field.
2. Click the **Search** button.

OR

3. Click the **Search** button without entering text into the **Contract Name** field to see the entire list of support contracts.

Adding, Editing and Deleting a Support Contract

To add a new support contract:

1. Click the **Add** button. This will open the Contract – Add window.
2. Enter the name of the new contract in the **Contract Name** field. This field is required.
3. In the **Standard Cost** field, enter the cost per (contract, incident, hour, etc.).
4. In the **Warning %** field, enter a value from 1 to 100. When the support contract has been used down to this specified percentage, the user will receive a notification that the contract may soon expire.
5. If this is a warranty contract, check the **Warranty** checkbox. The **Standard Cost** field can be left blank.
6. Enter any necessary comments in the **Comments** field.
7. In the Contract Type section, check the radio button next to the corresponding contract type.
8. If the contract is to be based upon a set number of issues, enter the number of issues in the "**Default Number of support issues**" text field.
9. If the contract is to be based upon a duration of time, enter the number of months, days and years in the text fields provided.
10. If the contract is to be based upon a pre-determined amount of support time, enter the hours and minutes in the fields provided.
11. Click the **OK** button when finished. The new contract will now appear in the contract list.

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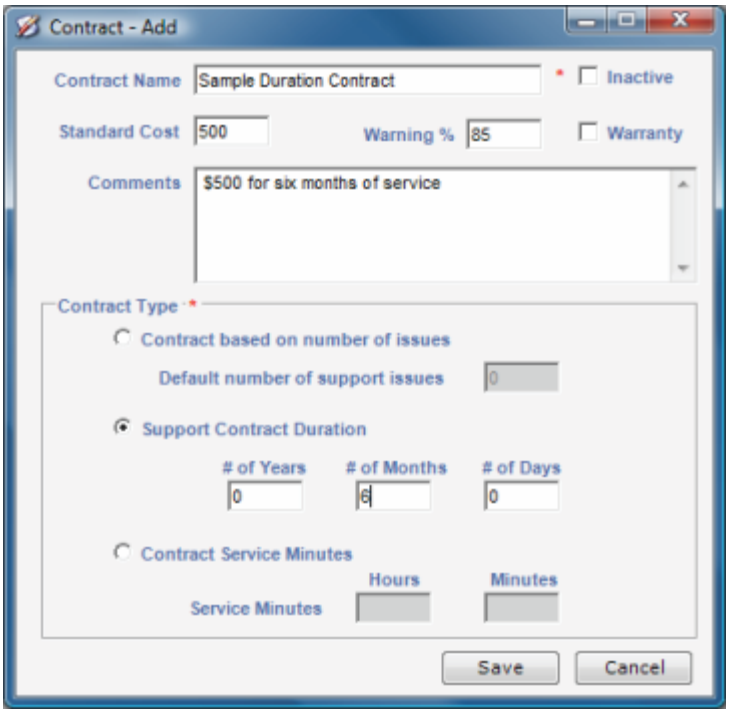

12. To edit a support contract, click the **Edit** button. This will open the Contract – Edit window, which is a duplicate of the Contract – Add window. Edit the contract and click the **OK** button when finished.
13. To delete a support contract, select the contract in the list and click the **Delete** button. Click the **OK** button at the prompt.

Holidays

Configuration > **Holidays**

Holidays are those days that are generally not included when tabulating time in a contract. (Note that this can be adjusted.) Help Desk Authority allows you to configure your own set of holidays.

The Holidays window will present a list of all the holidays that have been defined. Checking the **Show Past Holidays** checkbox will add holidays that have already past to the list.

Note that Help Desk Authority does not come with any pre-defined holidays. Each holiday recognized by your organization must be added individually, either in the Configuration Wizard or via Administration.

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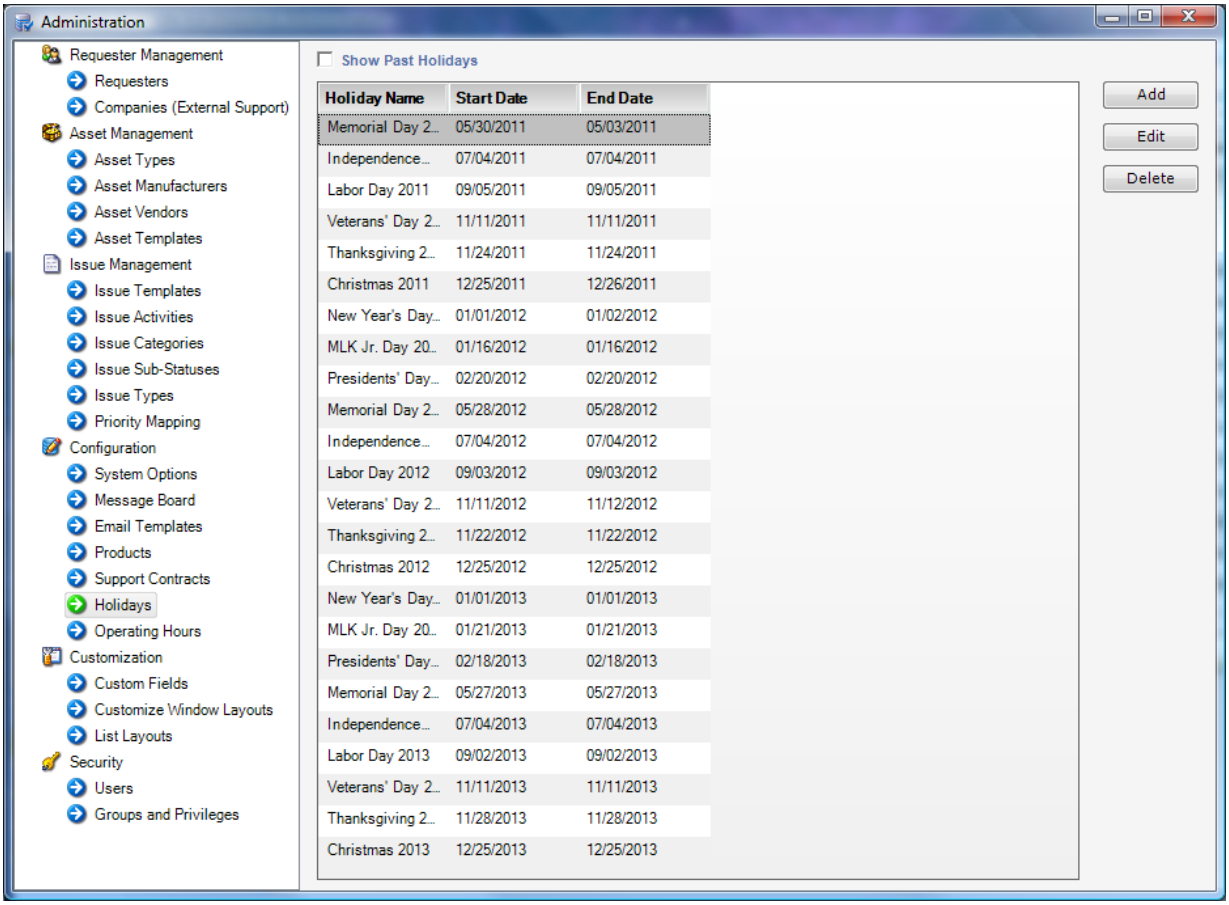

Adding, Editing and Deleting Holidays

To add a Holiday:

1. Click the **Add** button. This will open the Holiday – Add window.
2. Enter the start date in the **Start Date** field and the end date in the **End Date** field. These dates will usually be the same date. When you click the drop-down button, you will be presented with a calendar. Simply navigate to the day you would like to use for the holiday and click on it. The date will be populated in the field. You can also type the date into the field.
3. Enter a description for the holiday in the **Description** field.
4. Click the **OK** button when finished. The new holiday will now appear in the list.

When writing a description for your holiday, it is a good idea to include the year. This will enable you to set up multiple instances of the same holiday from year to year.

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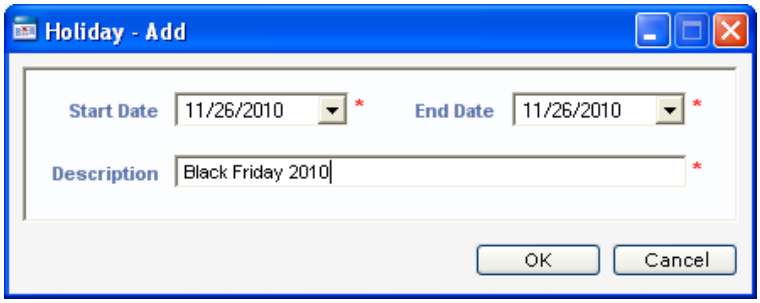

5. To edit a holiday, select the holiday and click the **Edit** button. This will open the Holiday – Edit window.
6. Make any necessary changes, then click the **OK** button.
7. To delete a holiday, select the holiday and click the **Delete** button. Click the **OK** button at the prompt.

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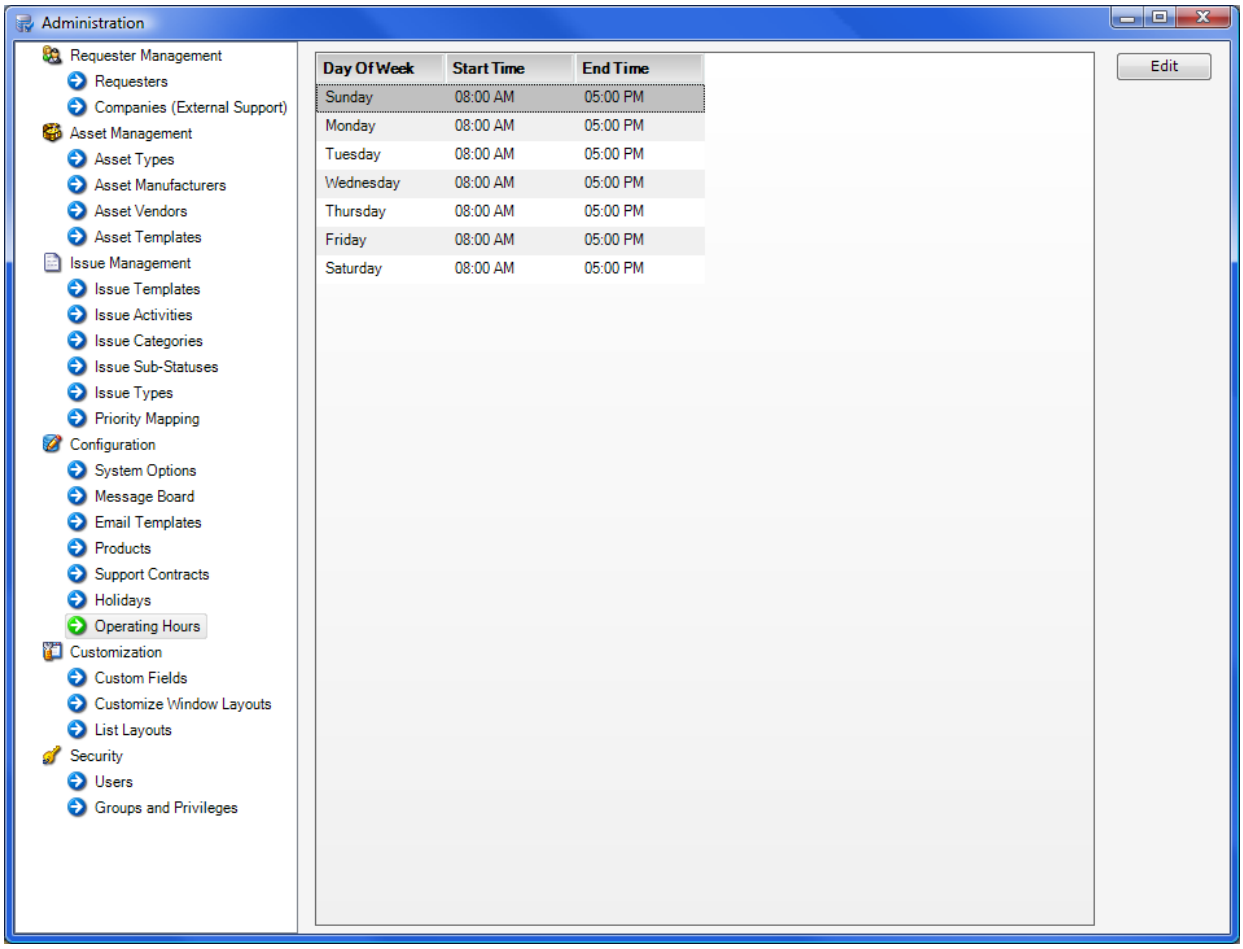
Operating Hours

Configuration > **Operating Hours**

Help Desk Authority allows individual help desks to set their own hours of operation. These hours will be taken into account when determining the age of issues, where you have the option of excluding non-working hours from the age calculation.

The Operating Hours window will present a list of days of the week, along with start times and end times. The list comes pre-populated with all seven days of the week. You will be able to adjust the times by following the instructions below.



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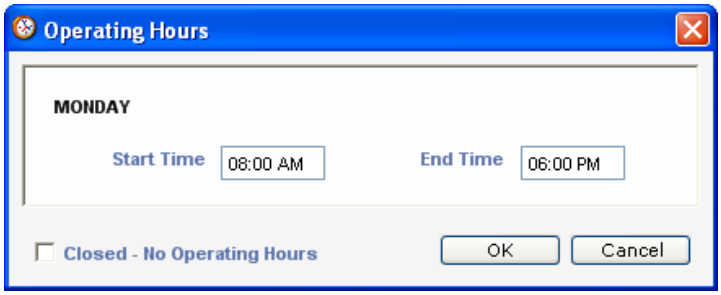
Editing Operating Hours

To edit Operating Hours:

1. Select the day of the week you would like to edit, then click the **Edit** button. This opens the Operating Hours window. You can also double-click the day.
2. Check or un-check the "**Closed – No Operating Hours**" checkbox. If checked, the **Start Time** and **End Time** fields will be disabled. If un-checked, you will be able to set the hours of each day to match those of your help desk.
3. Enter a start time and an end time in the **Start Time** and **End Time** fields.
4. Click the **OK** button when finished.



Customization

Every organization is different and has its own unique requirements. We have designed Help Desk Authority to meet the anticipated the needs of the user community. Help Desk Authority has provided a means to capture the information typical to most help desk/customer service environments. However, you also have the capability of creating your own fields to capture any type of data that you like. This capability is provided via customization, found under the **Customization** section of the Administration window.

There are three types of customizations available:

- Custom fields
- Customize Windows layouts
- Issue list layouts

Custom Fields

Customization > **Custom Fields**

Help Desk Authority allows you to create custom fields for assets, companies, customers and issues.

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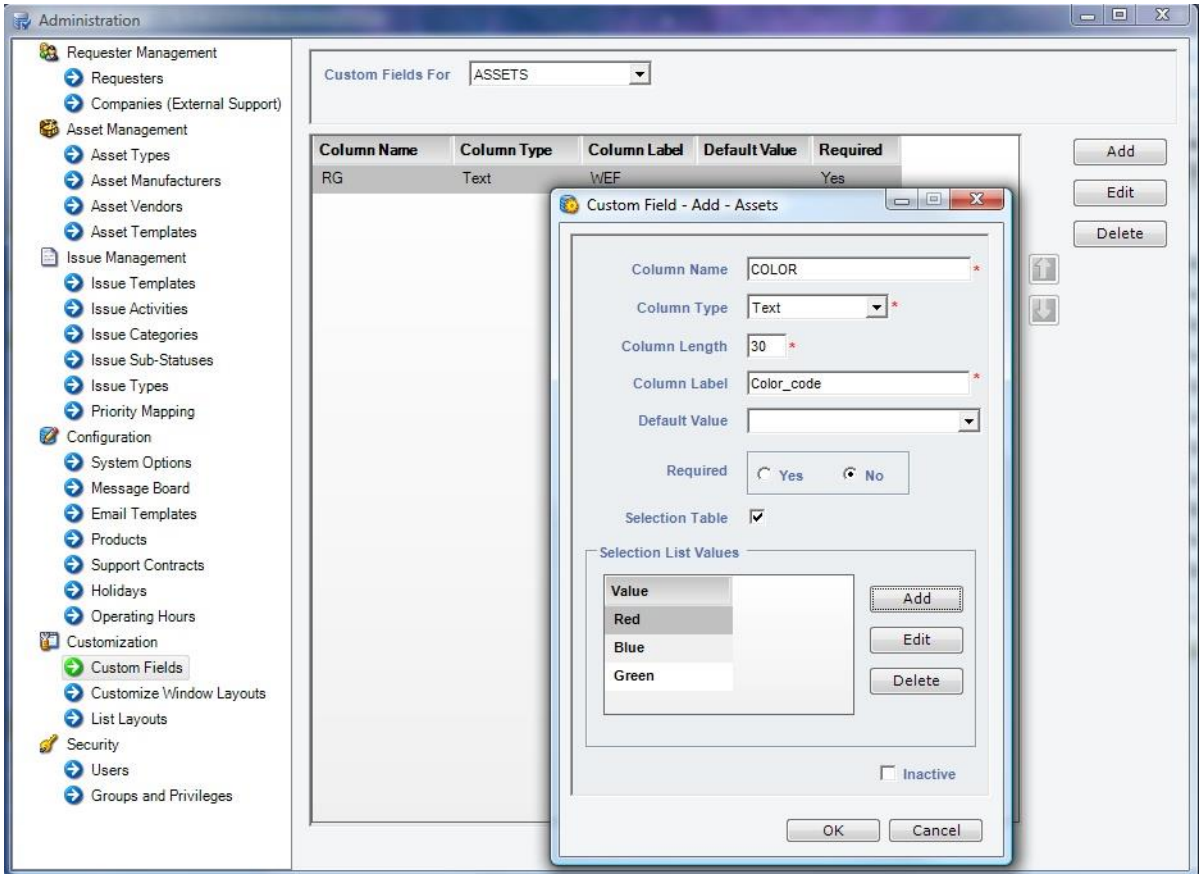
Creating, Editing and Deleting Custom Fields

To create a custom field:

1. In the **Custom Fields For** drop-down menu, select Assets, Companies, Requesters or issues.



2. Click the **Add** button. This will open the Custom Field – Add window.
3. Enter a column name in the **Column Name** field. This will be the name of a new column for the custom field within the database. This is a required field.
4. From the **Column Type** drop-down menu, select the type of data for the new field. This field is required.
5. Enter a numeric amount for the column length in the **Column Length** field. This field is required.
6. Enter the column label in the **Column Label** field. This label will appear with the custom field. This field is required.

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7. There are two radio buttons for determining the requirement of the field. If you wish the field to be required, select the **Yes** radio button. Otherwise, select the **No** radio button.
8. In the **Selection List Values** section, you can add, edit or delete values if the custom field will be a drop-down menu. To add values:
    a. Check the **Selection Table** checkbox.
    b. Click the **Add** button. This will open the Custom Field Value window.
    c. Enter the value for the selection in the **Value** field.
    d. Click the **OK** button.
    e. Repeat steps b-d for each additional value.
9. In the **Default Value** field, enter a default value that will be displayed, if any, in the field. If the field will be a direct entry field, enter the value. If the field will be a drop-down menu, select the default value from the **Default Value** drop-down menu.
10. When the custom field has been created, click the OK button. The custom field will now be displayed in the custom fields list under the appropriate “Custom Fields For” category.
11. To edit a custom field, double-click the field you wish to edit, or select the field and click the **Edit** button. This will open the custom field – Edit window. Make the edits and click the **OK** button. Note that you cannot edit the **Column Name**, **Column Type**, or **Column Length** fields because these are actually changes taking place in the database. You can change the **Column Label**, **Default Value** and **Selection List Value** fields.
12. To delete a custom field, select the custom field and click the **Delete** button.
13. To move custom fields up or down in the custom fields list, use the and buttons to the right of the list.

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Customize Window Layouts

Customization > **Customize Window Layouts**

In addition to customizing fields for data entry and defining your own selections for drop-down menus, Help Desk Authority also gives you the capability to tailor the actual layout of the issue, customer, Company and Asset windows.

The main Customize Window Layouts window consists of four tabs as shown below. Clicking on a tab will allow you to customize that particular layout.

- Issue
- Requester
- Company
- Asset

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The Standard Layout and ITIL

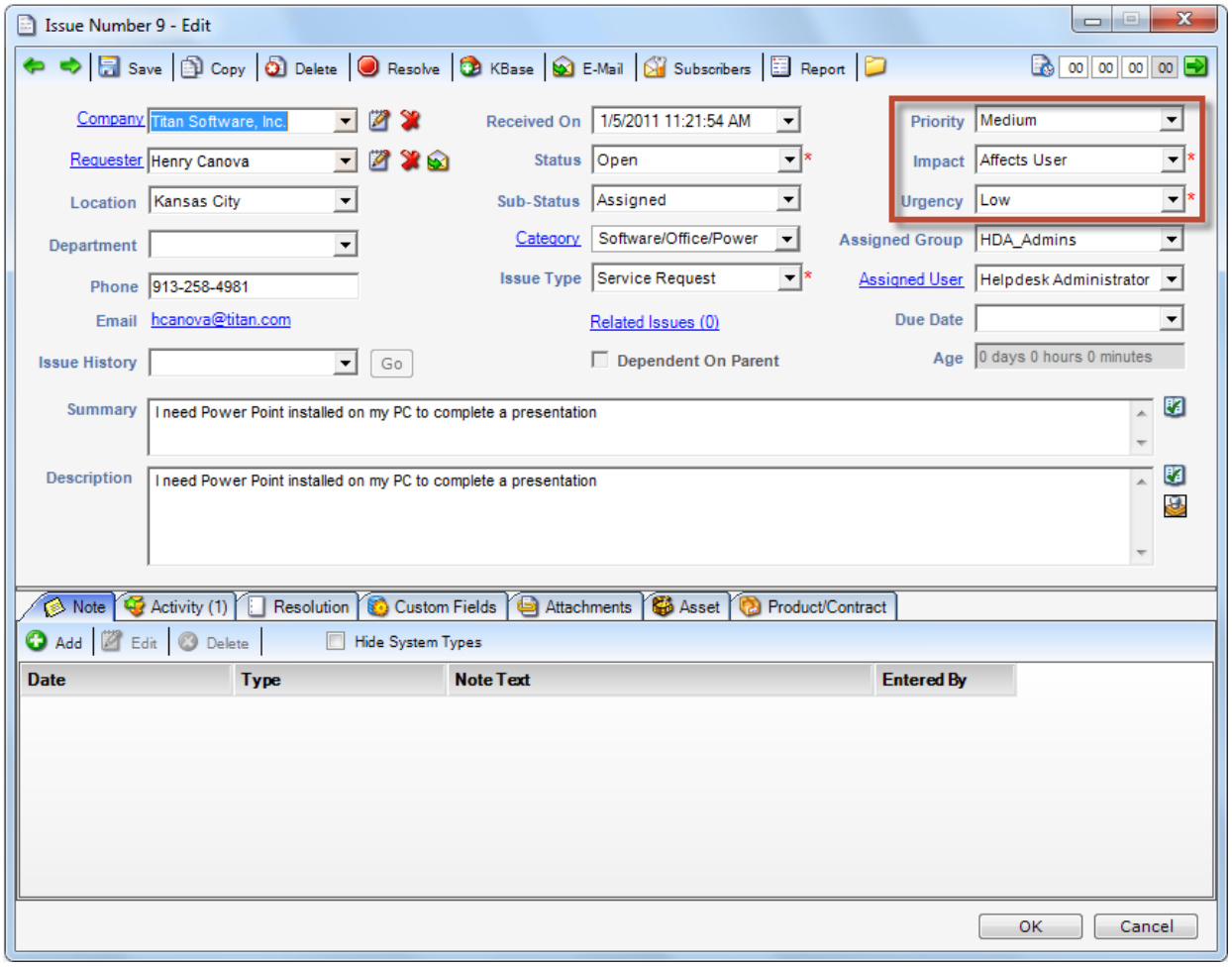
You will note that Help Desk Authority version 9 now includes a Priority Mapping feature (as described in detail earlier in this chapter under **Issue Management** > **Priority Mapping**) that conforms to ITIL (Information Technology Infrastructure Library) standards and best practices. In short, ITIL is a set of concepts and practices used for managing an IT organization. Included in these practices is a method of assigning Priority to an item based upon Urgency and Impact.

With the addition of the Priority Mapping feature, two additional fields are now standard in the default issue layout: **Impact** and **Urgency**.

As a user, you can chose to use this new method to automatically assign a Priority to an issue by assigning an Impact and an Urgency. However, if you prefer to simply use the **Priority** field alone, you will need to create a custom layout.

Examples of each are shown below. Notice the addition of the **Impact** and **Urgency** fields in the sample ITIL layout.

The Standard Layout – Note the added Impact and Urgency fields.



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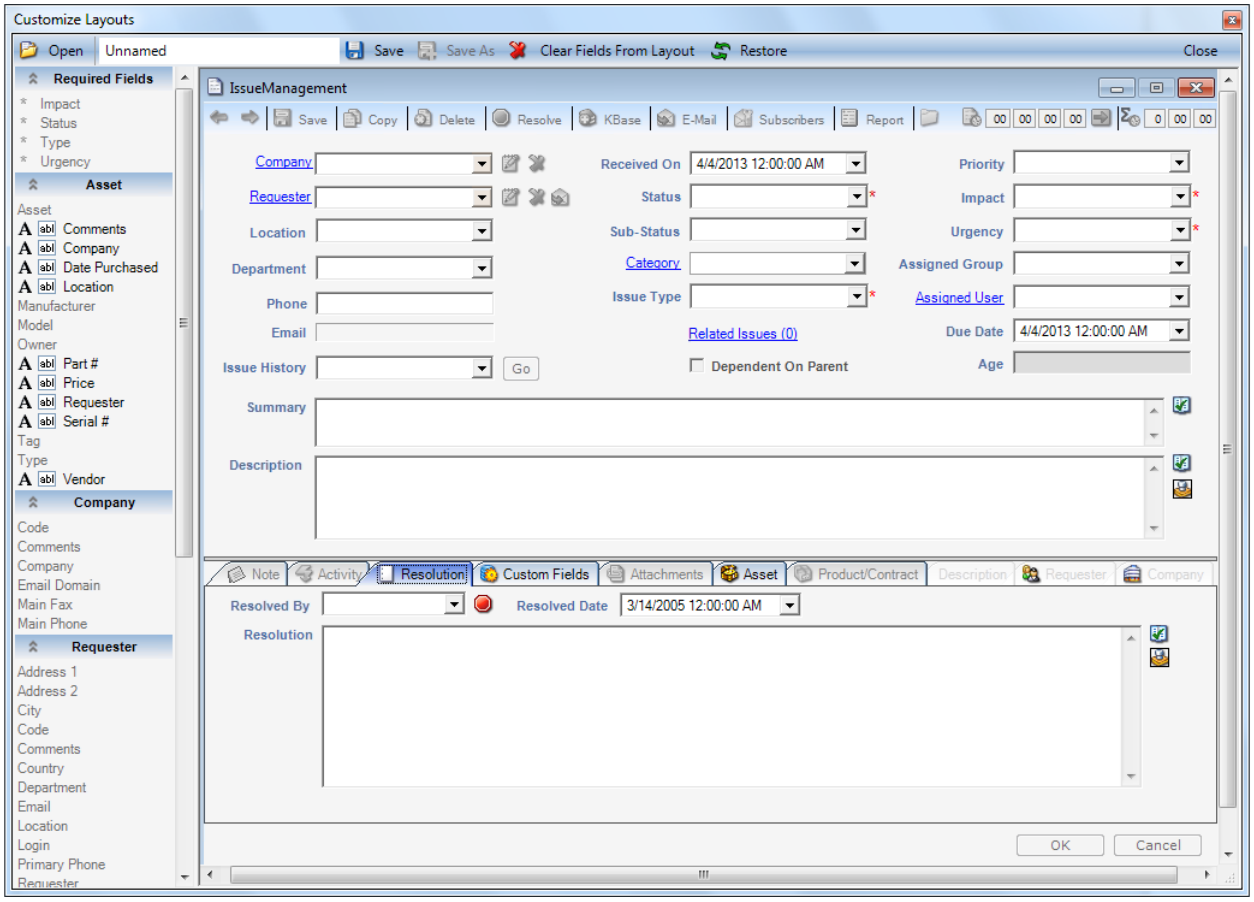
To Customize a Window Layout

1. Select a layout that you would like to customize, then click the **Add** button. This will open the Customize Layouts window with a duplicate of the layout you will be customizing or creating.



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2. If you would like to add elements to the layout, you can drag them from the left pane and drop them onto the layout wherever you like. The items that are grayed-out are already in the layout.

3. To remove an item from the layout, drag it to the left pane.
4. Elements in the layout can also be re-arranged in any manner you wish. To move a field, label or icon, click and drag it to the desired location.

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Field Properties

More options are available by right-clicking on a field or label. Right-clicking will bring up the pop-up menu shown below.

While you are customizing a window layout, you might want to drag and drop several fields to the layout before arranging them. At times, a field or two may be dropped on top of another field, either fully or partially. When this occurs, it may be difficult to find the field you are looking for when it comes time to arrange the layout. This is where the first two options come in handy. When fields are "stacked" in this manner, they have a "Z-Index". The Z-Index is the relative position of a field in the stack.

Bring To Front – When a field is behind another field on the layout but still partially visible, right-click on the field and select **Bring To Front** from the pop-up menu. This will place the selected field on top of the stack for easy access.

Send To Back – If you would like to reach a field that is behind other fields and not visible enough for the **Bring To Front** option, you can simple send the top field to the bottom of the stack, repeating the step until the desired field is visible. This is accomplished with the **Send To Back** option.

Remove – This option will completely remove the field from the layout.

Remove Field and Label – This option not only removes the field selected, but also the label that accompanies it. This saves you time and confusion when designing custom layouts.

Properties. – Selecting the Properties option will open a window displaying the properties of the selected field.

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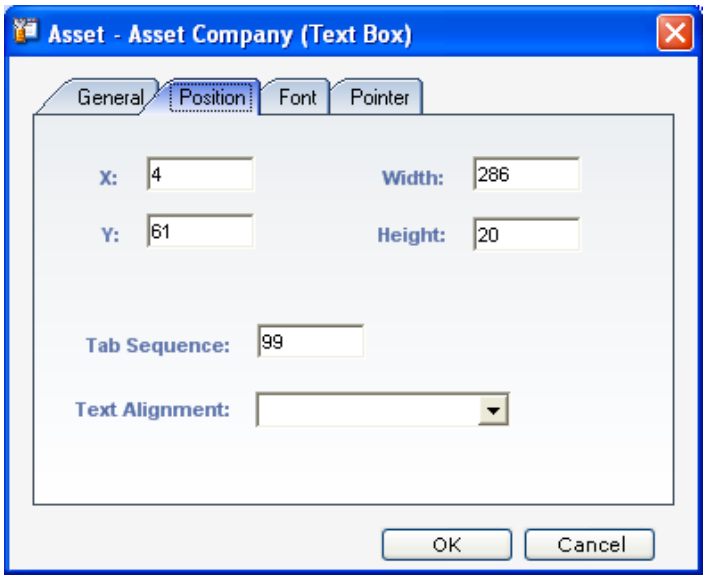
- **The General Tab** – Includes the **Border Style** drop-down. The default value will be the current setting of the field. This style can be changed by using the drop-down menu to select another style. If this option is grayed-out, as it is in the case of combo boxes, you will not be able to change the style.

  Checking the **Read Only** check box will "lock" the field with one value that cannot be changed by the user.

  Checking the **Required** check box will designate this field as one that is required. A small red asterisk will be placed next to the field in the window denoting the requirement. The record will not be saved unless all required fields have been completed.



- **The Position Tab** – This tab includes several fields relating to the size, position and alignment of the field. The **X** and **Y** fields are the coordinates of the field in the window. These can be changed for precise positioning.

  The **Width** and **Height** fields give the exact dimensions of the field. These can also be changed to alter the size of the field.

  The **Tab Sequence** field displays the numeric value that determines the order of selection when the Tab key is used to move between fields. For example, the first field in the window will usually have a Tab Sequence value of "1". When the Tab key is pressed, the cursor will jump to the field with the next highest Tab Sequence value. The default value is 99, and it can be changed to move the item up higher in the Tab sequence if desired.

  The **Text Alignment** field displays the alignment setting for the field. The possible values are Left, Right and Center.

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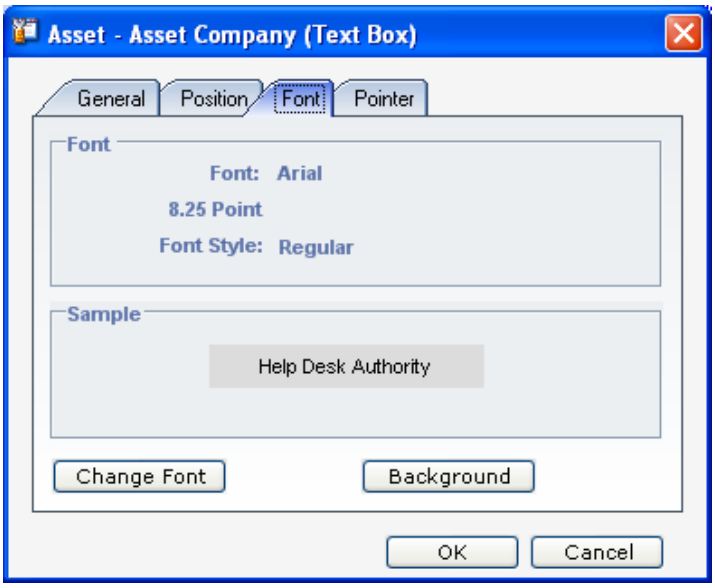

- **The Font Tab** – The first section of this tab displays the font, the size of the font, and the font style. The second section of the Font tab displays a sample of the text with the parameters displayed.

  These values can be changed. Clicking the **Change Font** button will open the Font window. From here, you can change the font, the font style and size, the effects, the color and the script. Clicking the **Background** button will open the Color window. From here you can select a new background color for the field. These two windows are shown below.

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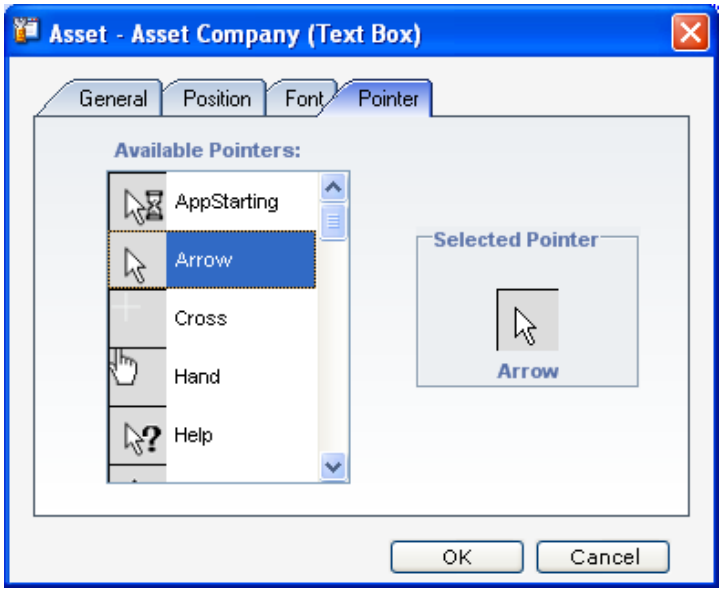
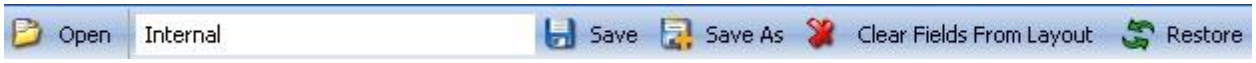


- **The Pointer Tab** – The fourth tab in the properties window is the Pointer tab. When you mouse over a field, the pointer will change to any value you select in this tab.

The Customize Layouts Window Toolbar

The toolbar on the top of the Customize Layouts window is used as a top-level control for your custom layouts.



Toolbar Item	Purpose
Open	Opens the "Open Window Customization" window. From here, choose issue, requester, company or asset who's layout you wish to create or modify.
Layout Name	The name of the current layout is displayed in this window. To change the name, simply place the cursor in this field and enter the data you wish.
Save	Saves the layout with the name displayed and in the location of the last saved window layout.
Save As	Opens the Save As window and prompts for a new name for the layout.
Clear Fields From Layout	Clears all fields from the current layout after a warning prompt.
Restore	Restores the layout to the state prior to any edits.

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List Layouts

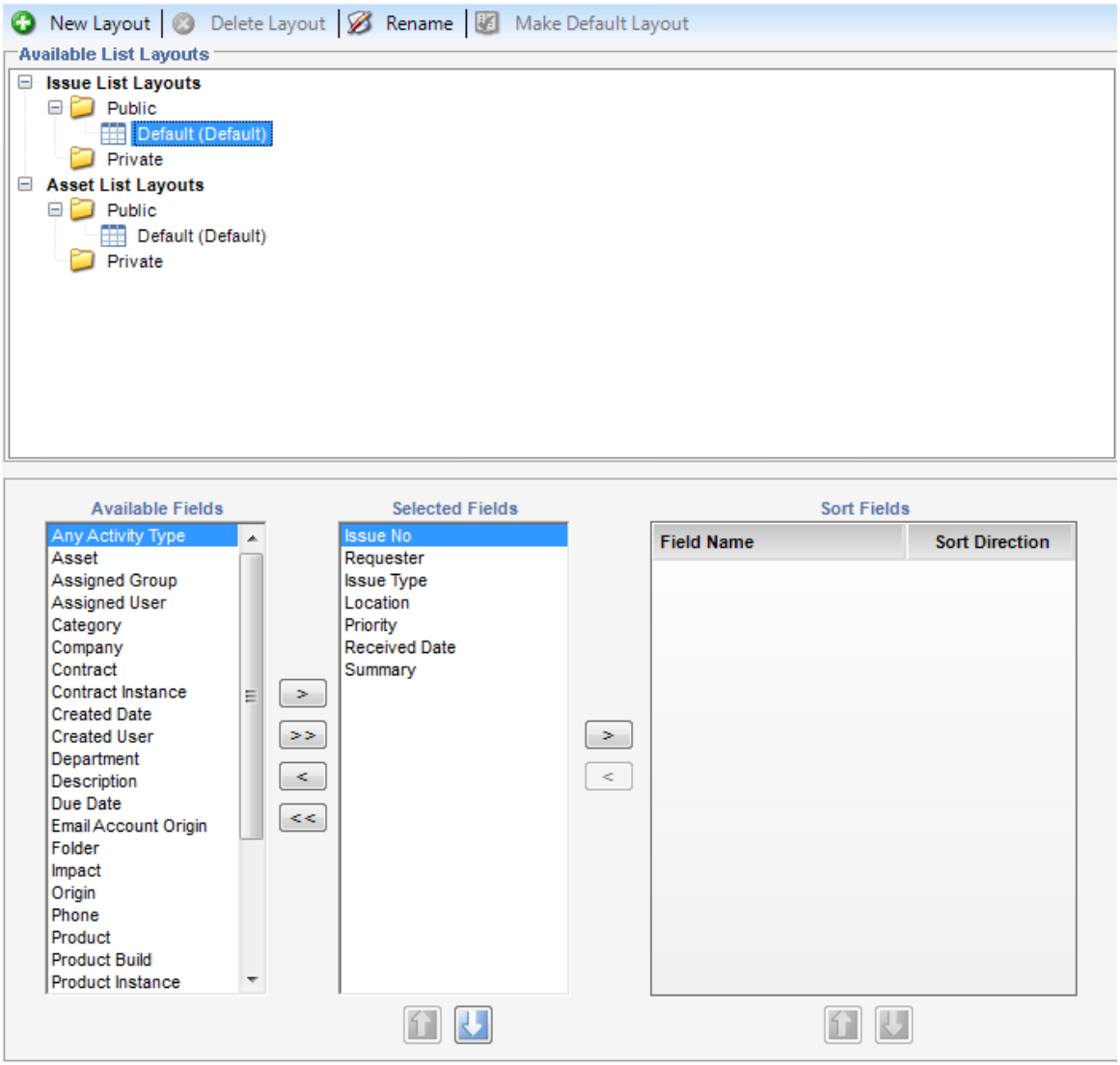
Customization > **List Layouts**

Issue and asset lists are used frequently throughout the Help Desk Authority application. They provide a quick, organized method for viewing groups of issues and assets.

Help Desk Authority generates an issue or asset list when you are:

- Viewing the contents of an issue or asset folder.
- Viewing the results of a query.
- Using the issue or asset search drop-down menu on the toolbar.
- Viewing issue history via the Issue, Asset, Requester, and Company windows.

Regardless of how you are viewing an issue or asset list, you can always select the specific issue information that you want to see. This is accomplished via list layouts.



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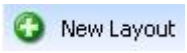
To create a new issue list layout:

1. Click the **New Layout** button. 

2. Enter a name for the new layout in the space provided.
3. Select the fields to be used in the list from the **Available Fields** menu. Select a field to be added and click the

button to move it to the **Selected Fields** menu. If you wish to move all available fields to the **Selected Fields** list, use the

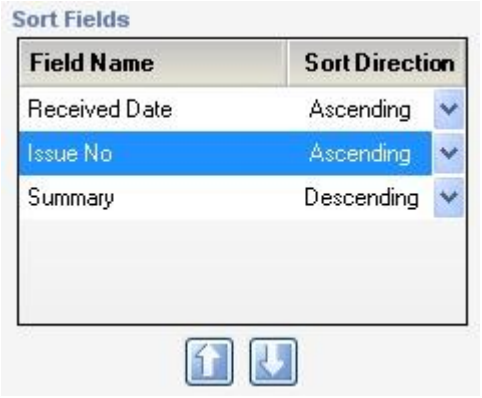
button. If you change your mind about a field, you can move it back to the Available Fields list with the

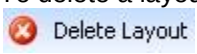
button. To start fresh, you can also move all selected fields back to the Available Fields list with the

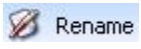
button.
4. Once the desired fields for your new layout are in the Selected Fields list, you will have the ability to arrange them in any order you like. To move a field in the order, simply select the field and use the and buttons to move a field up or down in the order.
5. Once your selected fields are in the preferred order, you will have the ability to order the data in each field by using the **Sort Fields** list. Select the fields upon which you would like to sort the data, then move them to the **Sort Fields** list using the

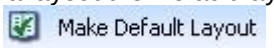
button. You can always move them back using the

button.
6. Select “Ascending” or “Descending” from the **Sort Direction** drop-down menu.
7. The fields can be prioritized in the **Sort Fields** list with the and buttons. For example, in the list below, the issues will be sorted first on Received Date (Ascending), then issue Number (Ascending) and finally Summary (Descending).



8. To delete a layout, select the layout from the Available List Layouts list and click the 

button.
9. To rename a layout, select the layout from the Available List Layouts list and click the 

button.
10. To make a layout the Default layout, select the layout from the Available List Layouts list and click the 

button.

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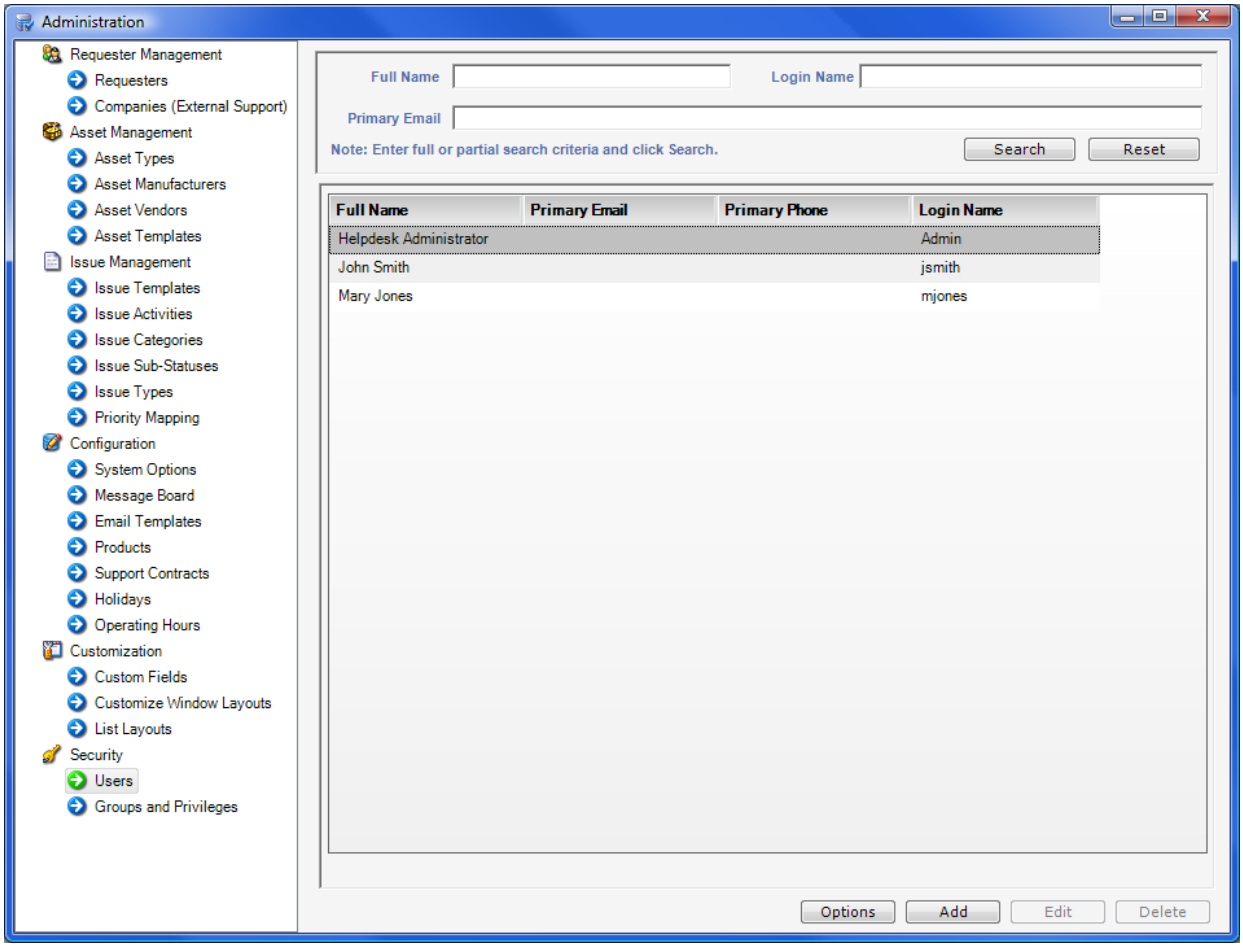
Security

Help Desk Authority's security is structured around groups. A group is a collection of users who are assigned specific security permissions. Groups are named in a manner that describes the group, such as "Technical Support" or "Help Desk".

After establishing Help Desk Authority users in the database, they can be assigned to a group. Each security group is then given access to specified Help Desk Authority functions. These functions are called privileges. For example, viewing an issue list, defining custom fields, deleting issues, and attaching files are privileges that can be assigned to a security group. Users may be assigned to more than one security group.

Users

Security > **Users**



In the Users window, a list of the users will be presented. You can also perform a search to find specific users by using the steps below.

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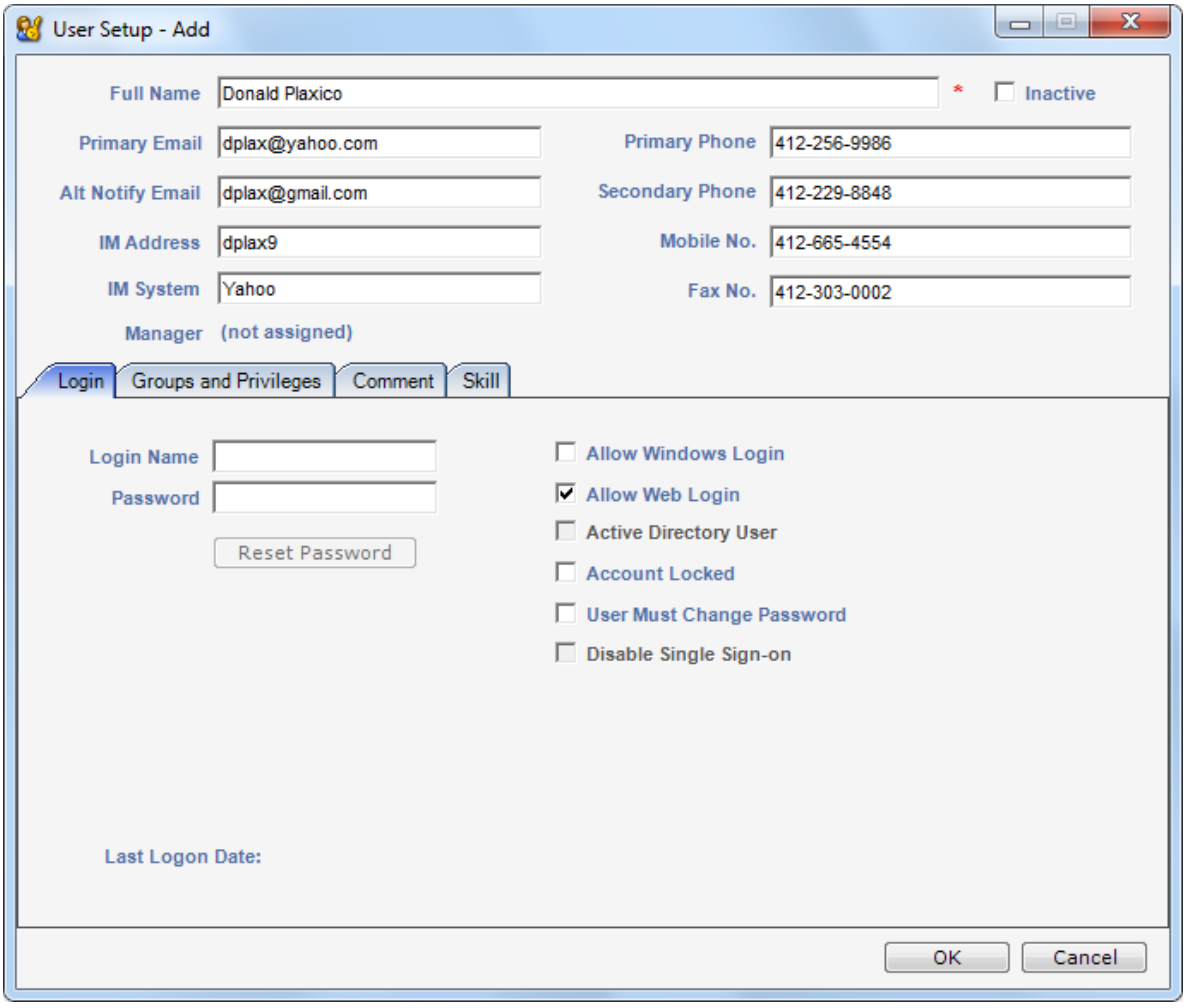
To Find a Specific User or Group of Users:

Enter search criteria in at least one of the fields outlined in Steps 1-3.

1. Enter the name (or partial name) of the user you are searching for in the **Full Name** field.
2. Enter the logon name (or partial logon name) of the user you are searching for in the **Logon Name** field.
3. Enter the primary email (or partial primary email) of the user you are searching for in the **Primary Email** field.
4. Click the **Search** button.

To Add a User



1. Click the **Add** button. This will open the User Setup – Add window.
2. Enter the full name of the new user in the **Full Name** field. This is the only required field when creating a new user.
3. Enter the primary email address of the new user in the **Primary Email** field.
4. If the user has an alternative email address, enter it in the **Alt Notify Email** field.

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5. If the user can be contacted through an instant messaging (IM) service, enter the user's instant messaging address (name) in the **IM Address** field, then enter the name of the IM service in the **IM System** field (i.e., Skype, Yahoo IM, AIM, etc.)
6. Enter the primary phone number in the **Primary Phone** field.
7. Enter the secondary phone number, if available, in the **Secondary Phone** field.
8. Enter the user's mobile number in the **Mobile Number** field.
9. Enter the user's fax number in the **Fax Number** field.
10. The **Manager** field is retrieved from Active Directory and is only applicable for users synchronized from Active Directory.

Below the basic user information fields, there are four tabs in the User Setup – Add window.

The Login Tab

The Login tab contains the necessary login credentials and permissions of the user.

1. Enter the logon name in the **Logon Name** field.
2. Enter the password in the **Password** field.
3. Check the **Allow Windows Login** checkbox if the user will be allowed to login to Help Desk Authority for Windows.
4. Check the **Allow Web Login** checkbox if the user will be allowed to login to Help Desk Authority for Web.
5. Check the **Active Directory User** checkbox if the user will be a member of the Active Directory.
6. If the account is to be locked, check the **Account Locked** checkbox.
7. If you would like the user to change his or her password upon first login, check the **User must change password** checkbox.
8. Check the **Disable Single Sign-on** checkbox to disable single sign-on for the user.

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9. Complete all the necessary information in the four tabs (explained below) of the User Setup – Add window.
10. Click the **OK** button. The new user will now appear in the User list.

The Groups and Privileges Tab

The Groups and Privileges tab contains group and privilege information of the new user.

1. To assign the new user to a group, select the group name in the **Available Groups** list on the left and click the [>] button. The group will now be visible in the **Is a member of these Groups** list on the right. You can add more than one group to the list.
2. To remove an assigned group from the user, highlight the group on the right and click the [<] button. The group will be moved to the left and will no longer be associated with the user.
3. To assign the new user to *all* available groups, click the [>>] button.
4. To remove *all* assigned groups from a user, click the [<<] button.
5. To assign a guaranteed privilege to the new user, select the privilege from the **Available Privileges** list on the left and click the [>] button. The privilege will now be listed in the **Guaranteed Privileges** list on the right. You can add more than one privilege to the list.
6. To remove a guaranteed privilege from the user, select the guaranteed privilege from the list and click the button. The privilege will move back to the **Available Privileges** list and will no longer be guaranteed to the user.
7. To assign all available privileges to the user, click the [>>] button.
8. To remove all guaranteed privileges from the user, click the [<<] button.
9. To revoke a specific privilege or privileges from the user, select the privilege from the **Available Privileges** list on the left and click the [>] button. The privilege will now appear in the **Revoked Privileges** list on the right.

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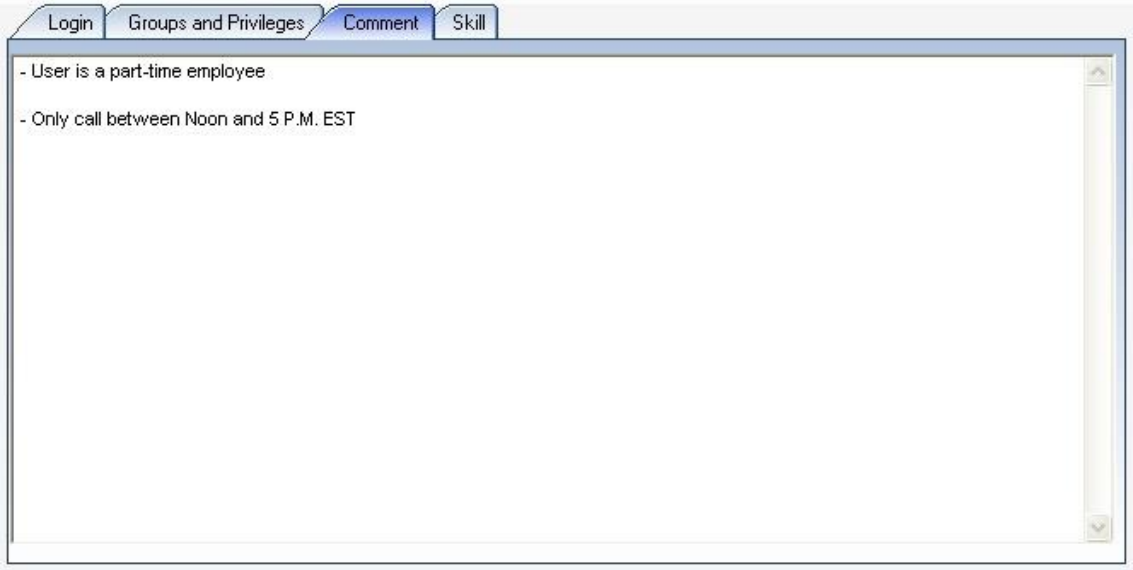
10. To remove a revoked privilege from the user, select the privilege on the right and click the button. The privilege will no longer be revoked for this user.
11. To revoke all available privileges from the new user, click the >> button.
12. To remove all revoked privileges from the user, click the << button.

The Comment Tab

The Comment tab is comprised of one large text field. Enter any notes or comments about the user here.



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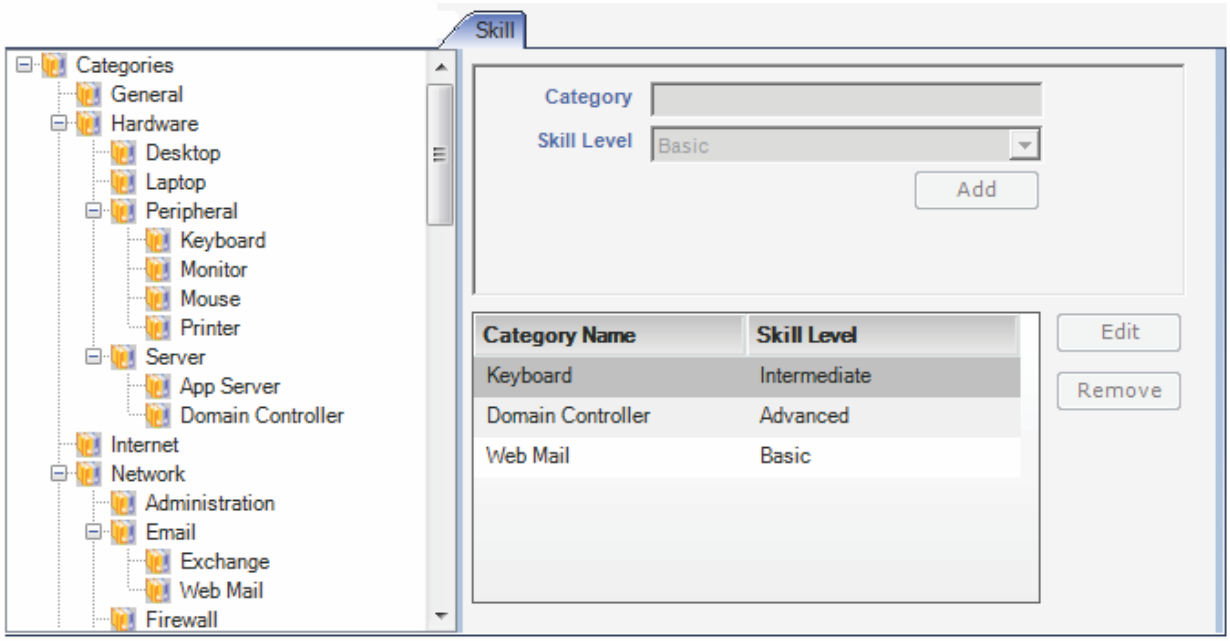
The Skill Tab

The Skill tab contains the specific skills the user may specialize in, as well as the skill level for each. These definitions make it easier to assign an issue to a specific user who may be more qualified to handle the issue than another user.



To assign a skill to a user:

1. Select a skill from the cascading list on the left. The skill will then appear in the **Category** field on the right.
2. From the **Skill Level** drop-down menu, select the skill level that applies to the chosen skill.
3. Click the **Add** button. The skill and skill level will now appear in the skills list on the lower right side of the window.
4. To edit a skill level, select the skill from the assigned skills list and click the **Edit** button. This will open the Skill – Edit window. Select the new skill level from the **Skill Level** drop-down menu, then click the **OK** button.
5. To remove a skill from the user, select the skill in the assigned skills list and click the **Remove** button. This will open the User Setup – Add window. Click the **OK** button.

To Edit a User

1. Select the user you wish to edit from the user list.
2. Click the **Edit** button. This will open the User Setup – Edit window, which is identical to the User Setup – Add window.
3. Make any changes necessary, then click the **OK** button.

To Delete a User

1. Select the user you wish to delete from the user list.
2. Click the **Delete** button. This will open the Users pop-up window.

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3. Click the **OK** button. The user will no longer appear in the user list.

The User Options

The User Options window allows you to define even more options for a specific user. The window contains two tabs:

- Email Settings Tab
- Miscellaneous Tab

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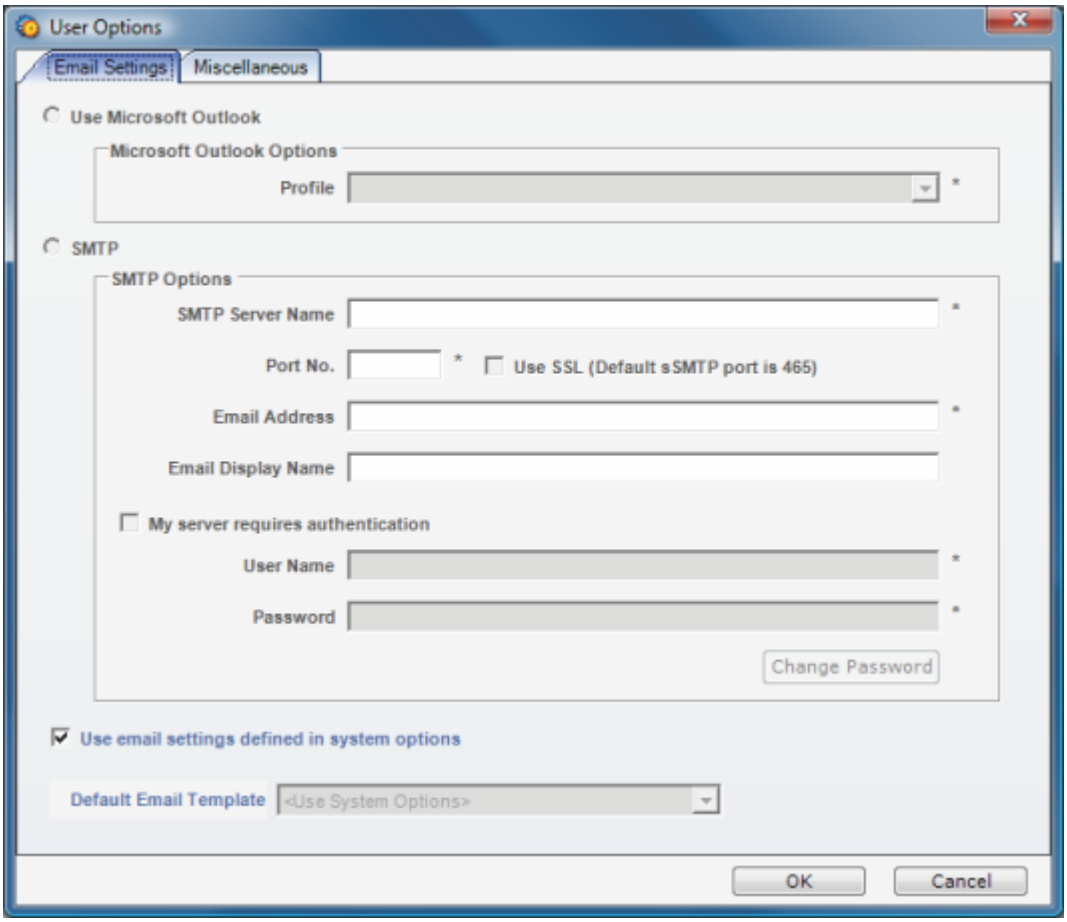
The Email Settings Tab

If you would like to set up custom email settings for a user instead of the settings defined in System Options, the Email Settings tab is where you will define them.



1. If you would like to use the email settings that you have already defined in the System Options, check the checkbox labeled "**Use email settings defined in System Options**". Otherwise, uncheck this checkbox and enter the email settings in the sections above this option.
2. Choose between the **Use Microsoft Outlook** and **SMTP** radio buttons depending on which email method you will be using.
3. If you will be using Microsoft Outlook, select a profile to use from the **Profile** drop-down menu. This is the only field in this section, and it is required.
4. If you will be using SMTP, enter the SMTP server name, the port number, and the email address in the appropriate fields. These are all required. The **Email Display Name** field is optional.
5. Check the "**My Server Requires Authentication**" checkbox if necessary, and enter the user name and password in the appropriate fields.
6. In the **Default Email Template** drop-down menu, choose the template you would like to use, or just leave the default (<Use System Options>) setting as is.

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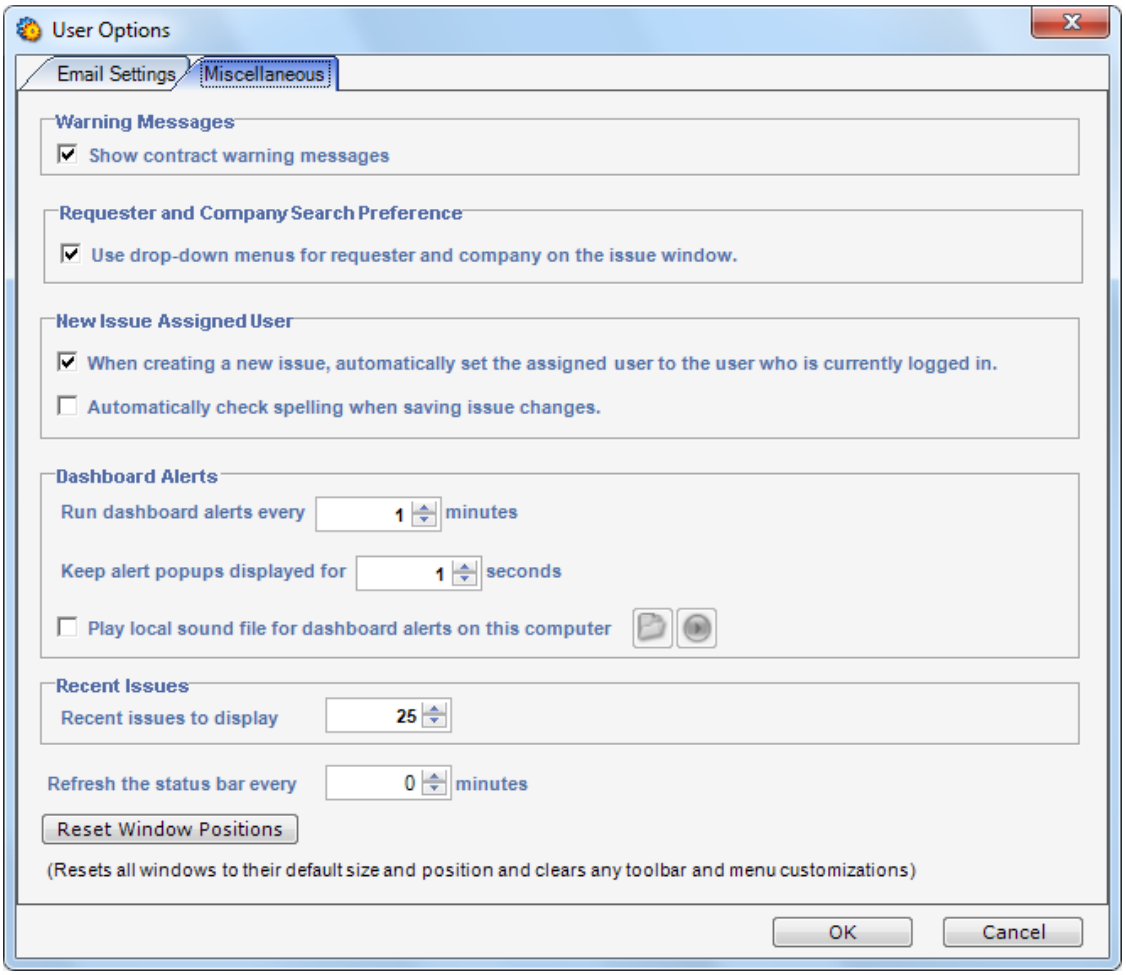
The Miscellaneous Tab

The Miscellaneous tab contains information for warning messages, search preferences, issue preferences and dashboard alert options.


User Options
Email Settings
Miscellaneous
Warning Messages
Show contract warning messages
Requester and Company Search Preference
Use drop-down menus for requester and company on the issue window.
New Issue Assigned User
When creating a new issue, automatically set the assigned user to the user who is currently logged in.
Automatically check spelling when saving issue changes.
Dashboard Alerts
Run dashboard alerts every 1 minutes
Keep alert popups displayed for 1 seconds
Play local sound file for dashboard alerts on this computer
Recent Issues
Recent issues to display 25
Refresh the status bar every 0 minutes
Reset Window Positions
(Resets all windows to their default size and position and clears any toolbar and menu customizations)
OK
Cancel

1. Check the "**Show contract warning messages**" checkbox if you would like the user to be notified when a contract is about to expire.
2. Check the "**Use drop-down menus for requester and company on the issue window**" checkbox if you would prefer drop-down menus over the search option.
3. Check the "**When creating a new issue, automatically set the assigned user to the user who is currently logged in**" checkbox if you wish to automatically assign the issue to the active user.
4. Check the "**Automatically check spelling when saving issue changes**" checkbox if you would like to ensure accurate spelling in your issues.
5. For Dashboard Alerts, use the number fields for the frequency of alerts and the duration of pop-ups. You can also choose to play a local sound file for alerts.
6. In the **Recent issues to display** field, enter the number of recent issues to display.
7. If you would like the status bar to automatically refresh at certain intervals, enter the number of minutes between refreshing in the **Refresh the status bar every** field.

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8. Click the **Reset Window Positions** button to reset all Windows to their default size and position.
9. Click the **OK** button when finished.

Groups and Privileges

Security > **Groups and Privileges**

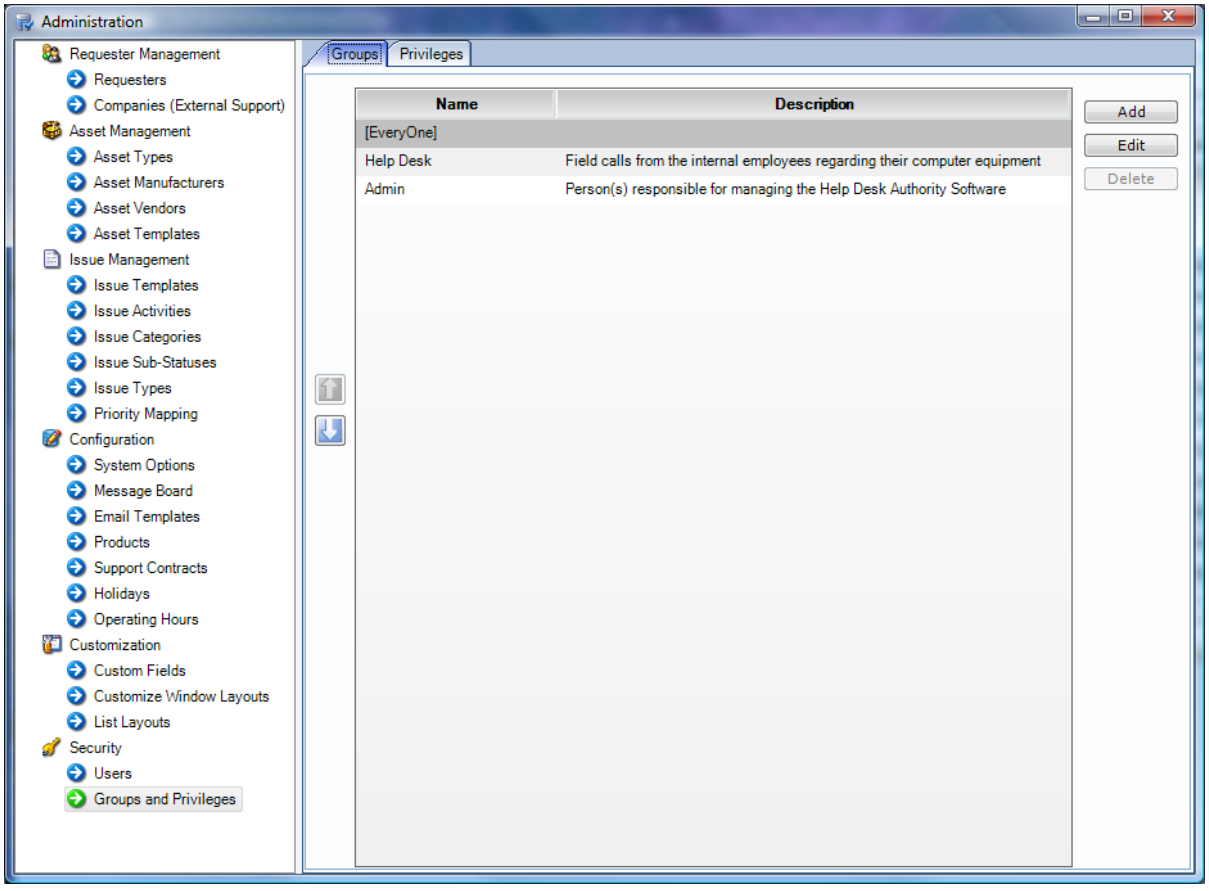
Help Desk Authority's security is structured around user groups. Users in a group are all granted the same privileges for access to specific functions of Help Desk Authority. A user can be a member of more than one group, and specific privileges can also be granted at the user level for custom security options.

There are two tabs in the Groups and Privileges window:

- Groups
- Privileges

The Groups Tab

The Groups tab is shown below.



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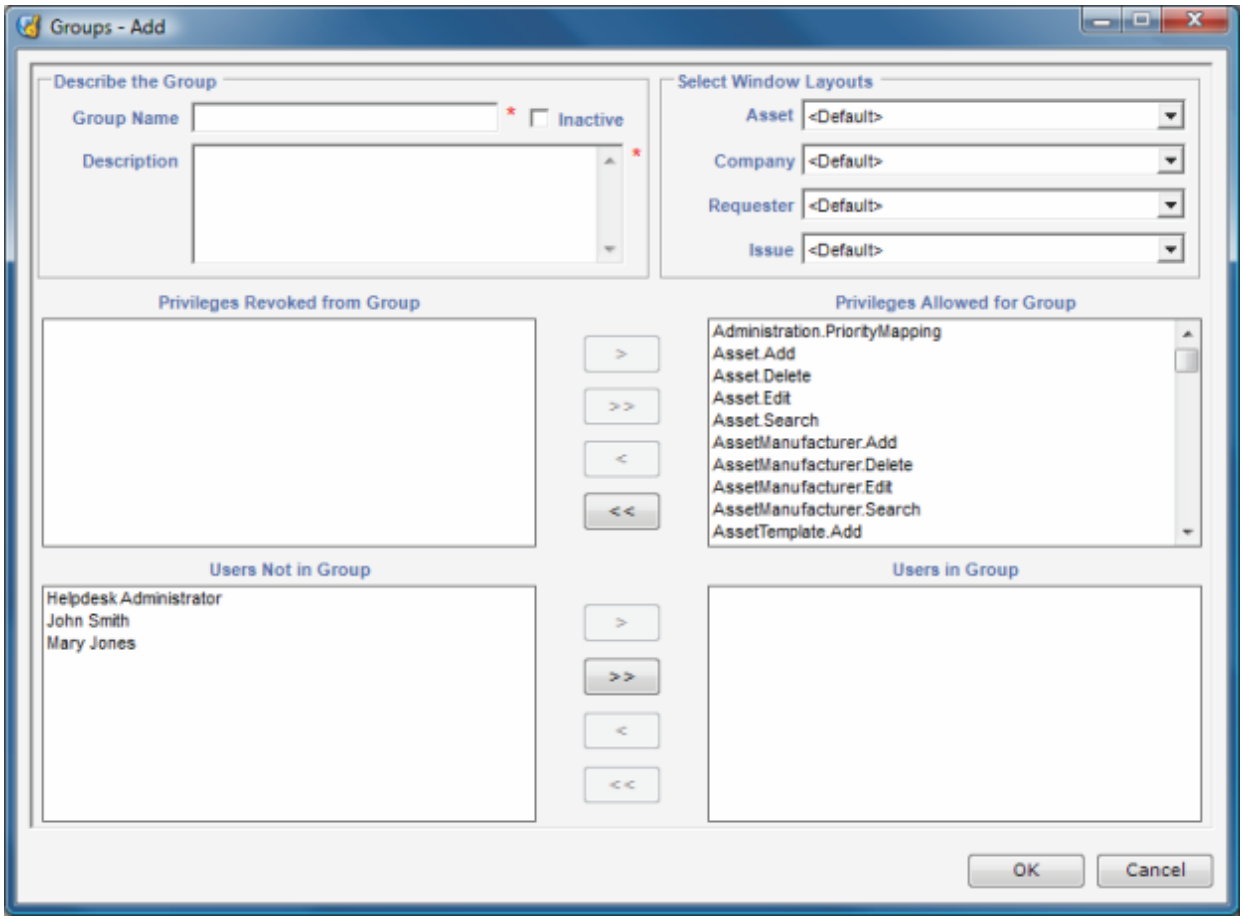
Creating a Group

In the Groups tab:

1. Click the **Add** button. This will open the Groups – Add window.



2. Enter the group name in the **Group Name** field. This field is required.
3. Enter a description of the group in the **Description** field. This field is also required.
4. In the “Select Windows Layouts” section, use the drop-down menus to select your preferred window layout for assets, companies, requesters and issues.
5. In the Privileges section of the Groups tab, you can select which privileges to allow or revoke for your new group. Select the privilege and use the arrow buttons to move it to the preferred list (Allowed or Revoked).
6. In the Users section of the Groups tab, select users from the “Users not in Group” list and move them to the “Users in Group” list using the arrow buttons.
7. Once your group has been created, click the **OK** button.
8. Once you have created several groups, they can be prioritized within the group list. The group highest in the list will always take precedence over lower groups. Group priority is important when a user belongs to more than one group. To prioritize a group, select the group and move it up or down in the group list using the and buttons.

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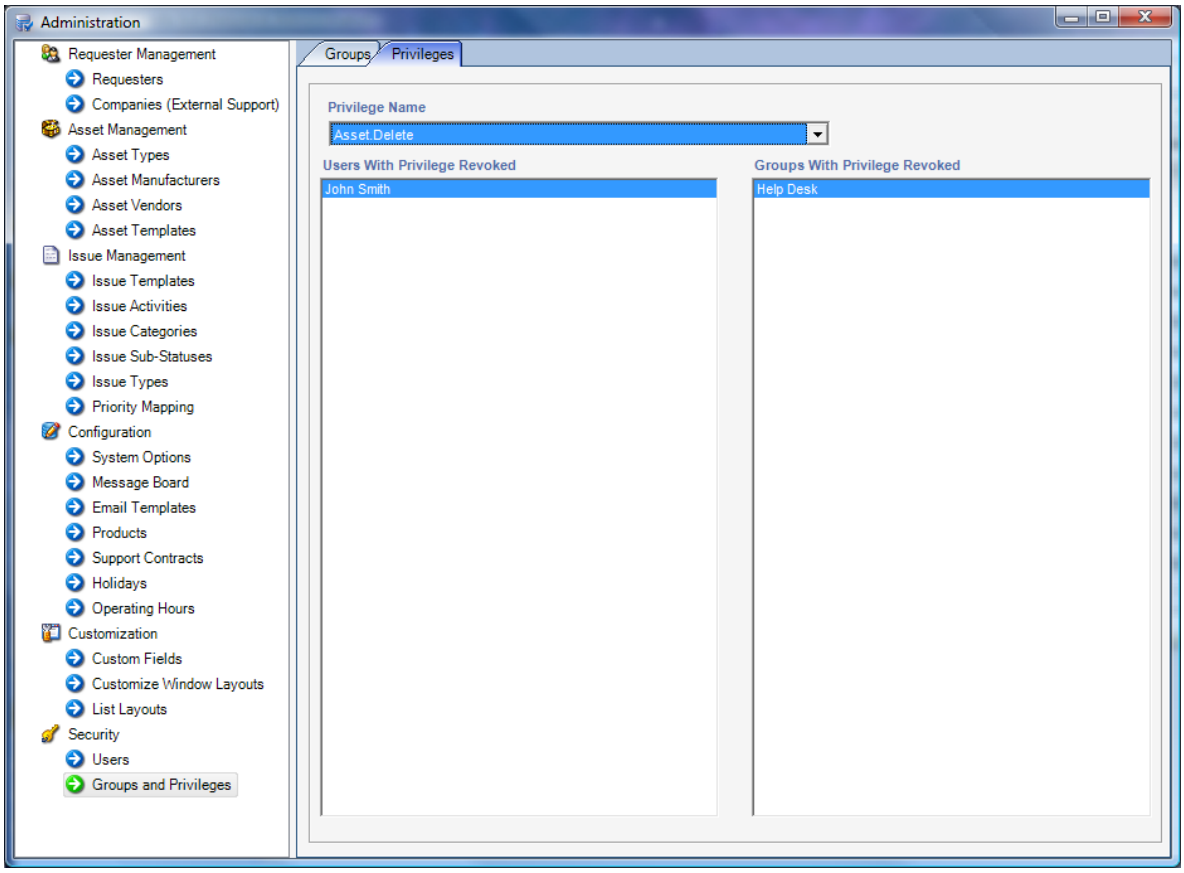
9. To edit a group, select the group and click the **Edit** button. This will open the Groups – Edit window. Make the edits to the group then click the **OK** button.
10. To delete a group, select the group and click the **Delete** button. When prompted, click the **OK** button to confirm the deletion.

The Privileges Tab

The Privileges tab is shown below.



The Privileges tab in the Groups and Privileges window is used for information only. At the privilege level, it will tell you at a glance which users and which groups have this privilege revoked.

In the screenshot above, the Asset Manufacturer - Add window has been revoked for the user John Smith. This privilege has also been revoked for the Help Desk Authority group.

To view information about a specific privilege, select it from the **Privilege Name** drop-down menu.

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Chapter 4 – Issues

Issues are items that are tracked from inception to closure. Issues track information on reported incidents including:

- Who reported the issue
- To whom the issue was assigned
- The issue category, Priority, and status
- The assets involved
- The actions taken toward resolution
- Time spent and associated costs

Accurate issue records will help you to optimize resolution time, better manage your workloads, and facilitate communication with your customers.

Help Desk Authority's issue management enables you to:

- Link related issues with dependencies promoting easy and logical workflow.
- Route issues to personnel based on group, status, and expertise using Skills Based Assignment.
- Apply your organization's hours of operation to accurately age and manage issues.
- Link issues to products you support and contracts you service.

The Issues Toolbar

Icon	Result
	Create new issue. Opens the New Issue window. The sub-menu allows you to create an issue from a template.
	Copy issue. Copies the issue, as follows: • Fields copied as is: Impact, Urgency, Priority, Requester, Company, Asset, Location, Department, Issue Type, Category, Layout, Assigned Group, Assigned User, Phone, Product/Contract, Description, Resolution, and Custom Fields. • Summary copies with the original issue number appended to the beginning. • Created Date is the current date and Created User is the user who copies the issue. • If the original issue has an "Open" Status and a defined Sub-Status, it is preserved when copied; otherwise, the Status is "Open" with a blank Sub-Status. • Due Date is newly calculated based on the Priority, if applicable. • Fields set to blank: Resolved By, Resolved Date, and Issue Time. • Fields not copied: Notes/Activities, Subscription details, Attachments, and child issues and related issues. However, if the original issue has a parent, it is preserved.

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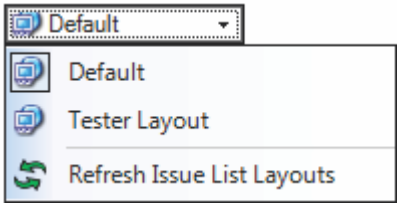
Edit	Edit Issue. Opens the Issue – Edit window.
Resolve	Resolve issue. Marks the selected issue as resolved with a status of "Closed".
Delete	Delete Issue. Deletes the selected issue.
Email	Compose email. Opens the compose Email window to send an email regarding the selected issue.
Folder	Add to folder. Opens the Add Issue to Folder window.
Report	Report issue. Opens the Report View window.
Print	Print issue. Prints the issue.

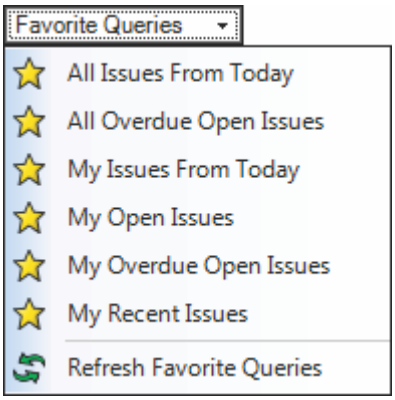
Next to the issues toolbar are three drop-down menus, described below.

The List Layout Menu



This drop-down menu allows you to choose which list layout to use. In the example above, you can choose from All Fields, Default, and a sample list layout called Tester Layout. Select "Refresh Issue List Layouts" to make sure you have a complete list of all current issue list layout options.

The Favorite Query Menu



This drop-down menu allows you to determine which issues will appear in the issue list.

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The Export Menu

This drop-down menu allows you to choose a format for exporting an issue.

View Separate Window Icon

The icon will break out the issue list window into a separate window.

The Issues Filter Pane

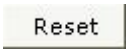
The icon next to the drop-down menus opens the **Issues Filter Pane**. In the example below, the option has been selected to show the filter. The filter appears immediately above the issue list.

From this view, the current query can be edited to suit your needs. The controls are very similar to the Query window controls.

The button will remove the selected conditions from the query.

The button will add a new condition to the query.

The button will apply the changes you have made to the existing query.

The  button will remove all conditions from the query.

The Issues List Grid

The issues list grid is the main area of the window when “Issues” is selected in the Navigation Pane. The issues list grid lists all the issues that match the criteria of the current issue list layout. You can display as much or as little information in the issues list as you like by customizing issue list layouts in the Administration window as discussed in the previous chapter. The example below shows the default “All Fields”. Notice the horizontal scroll bar at the bottom of the grid. Sliding the scroll bar to the right will reveal much more data than is shown in the current view.

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Issue No	Origin	Status	Sub-Status	Description	Resolution	Contract	Product Name	Fc
1		Open	Open - In Progr...	Expired Norton...				
2		Open	Open - In Progr...	Office 2010 will...				
3		Open	Open - Assigned	Login privileges...				
4		Open	Open - Assigned	Requester requi...				
5		Open	Open - New	Requester is ha...				
6		Open	Open - Assigned	Server issues h...				
7		Open	Open - Assigned	Intranet needs s...				
8		Open	Open - In Progr...	Data, wireless,...				
9		Open	Open - New	Office 2010 inst...				
10		Open	Open - In Progr...	Database appe...				
11		Open	Open - In Progr...	Email encyption...				

The issues list grid below contains seven fields and represents a more realistic view for the average user.

Issue No	Priority	Created Date	Assigned Group	Sub-Status	Company	Description
1	3 - Medium	3/13/2008 11:08...	Admin	Open - In Progr...	Titan Software,...	Expired Norton Anti-virus on Dell laptop. Will...
2	3 - Medium	3/13/2008 11:09...	Help Desk	Open - In Progr...	Titan Software,...	Office 2010 will be installed on Requester's P...
3	4 - Low	3/13/2008 11:10...	Admin	Open - Assigned	Titan Software,...	Login privileges need to be reset for the new...
4	4 - Low	3/13/2008 11:11...	Help Desk	Open - Assigned	Titan Software,...	Requester requires assistance in Microsoft Of...
5	2 - High	3/13/2008 11:18...	Help Desk	Open - New	Titan Software,...	Requester is having POP3 issues.
6	2 - High	3/13/2008 11:19...	Help Desk	Open - Assigned	Titan Software,...	Server issues have caused multiple connectio...
7	1 - Urgent	3/5/2009 11:12...	Admin	Open - Assigned	Titan Software,...	Intranet needs several broken links corrected.
8	1 - Urgent	3/5/2009 11:21...	Help Desk	Open - In Progr...	Titan Software,...	Data, wireless, and voice support so when yo...
9	2 - High	3/5/2009 11:23...	Admin	Open - New	Titan Software,...	Office 2010 installation is required.
10	2 - High	3/5/2009 11:34...	Admin	Open - In Progr...	Titan Software,...	Database appears to be corrupted.
11	2 - High	3/5/2009 11:38...	Help Desk	Open - In Progr...	ACME Products	Email encyption CRAM-MD5 was always sup...
12	3 - Medium	3/5/2009 11:59...	Help Desk	Open - New	Titan Software,...	Replacement toner needs installed by service...

While most users will create their own issue list layouts, many users will use the default issue list layout shown below.

Issue No	Requester	Issue Type	Priority	Received Date	Summary
1	Adam Cox	Installation	3 - Medium	3/13/2008 11:07 AM	My anti-virus has expired on my laptop.
2	Henry Canova	Software Bug	3 - Medium	3/13/2008 11:08 AM	I need Microsoft Power Point installed on my PC.
3	Adam Cox	Question (How...	4 - Low	3/13/2008 11:10 AM	New employee needs network login privileges established.
4	Adam Cox	Installation	4 - Low	3/13/2008 11:11 AM	Needs help installing MS Excel
5	Terry Carrick	Question (How...	2 - High	3/13/2008 11:18 AM	I am unable to connect to the email server
6	Walter Cobb	Hardware Failure	2 - High	3/13/2008 11:18 AM	Network connection is down
7	Walter Cobb	Software Bug	1 - Urgent	3/5/2009 11:10 AM	Several links not working on the Intranet Site
8	Henry Canova	Hardware Failure	1 - Urgent	3/5/2009 11:16 AM	Cisco Catalyst 2960 Switche needs replaced on the 3rd flo...
9	Henry Canova	Installation	2 - High	3/5/2009 11:21 AM	I need Power Point installed on my PC to complete a pres...
10	Walter Cobb	Software Bug	2 - High	3/5/2009 11:30 AM	Unable to import excel files into the accounting database
11	Danica Lusher	Software Bug	2 - High	3/5/2009 11:37 AM	Email encyption CRAM-MD5 was always supposed to hav...
12	Henry Canova	Installation	3 - Medium	3/5/2009 11:58 AM	Toner needs replace in the printer on the 1st floor

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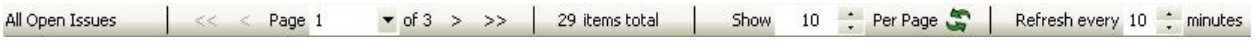
The Refresh Pane

The refresh pane is located between the issue list pane and the preview pane. The refresh pane describes the contents of the issue list pane in overall detail.



- The first section displays the name of the current query. In the example above, the query is "All Open Issues".
- The second section displays the page number you are on and how many pages of results there are. You can jump to any page by using the drop-down menu.
- The third section gives the total number of results from the query.
- The fourth section displays how many results to display per page. You can enter any number from 1 to 999,999 by using the up and down arrow buttons or by entering in a number manually. The refresh icon ( ) next to the per-page count can be used at any time to update the issue list.
- The fifth and final section of the refresh pane indicates how many minutes will expire between automatic refreshes of the issue list. You can enter a number from 1 to 99 manually, or you can use the up and down arrow buttons.

The Preview Pane

The preview pane (shown below) presents the user with a selection of details from the selected issue.

Summary
I am unable to connect to the email server
Description
Requester is having POP3 issues.
Issue No 5
Status Open
Requester Terry Carrick
Received On 3/13/2008 11:18:04 AM
Company Titan Software, Inc.
Asset
Last Activity Description has changed: --> by Helpdesk Administrator @ 8/23/2010 11:36:22 AM
Preview

You can toggle the preview pane on and off by clicking the icon at the bottom of the page. Turning off the preview pane will allow you to view more issues in the issue list. Below is an example where the preview pane is hidden. You can un-hide the preview pane by clicking the icon at the bottom of the page as shown below.

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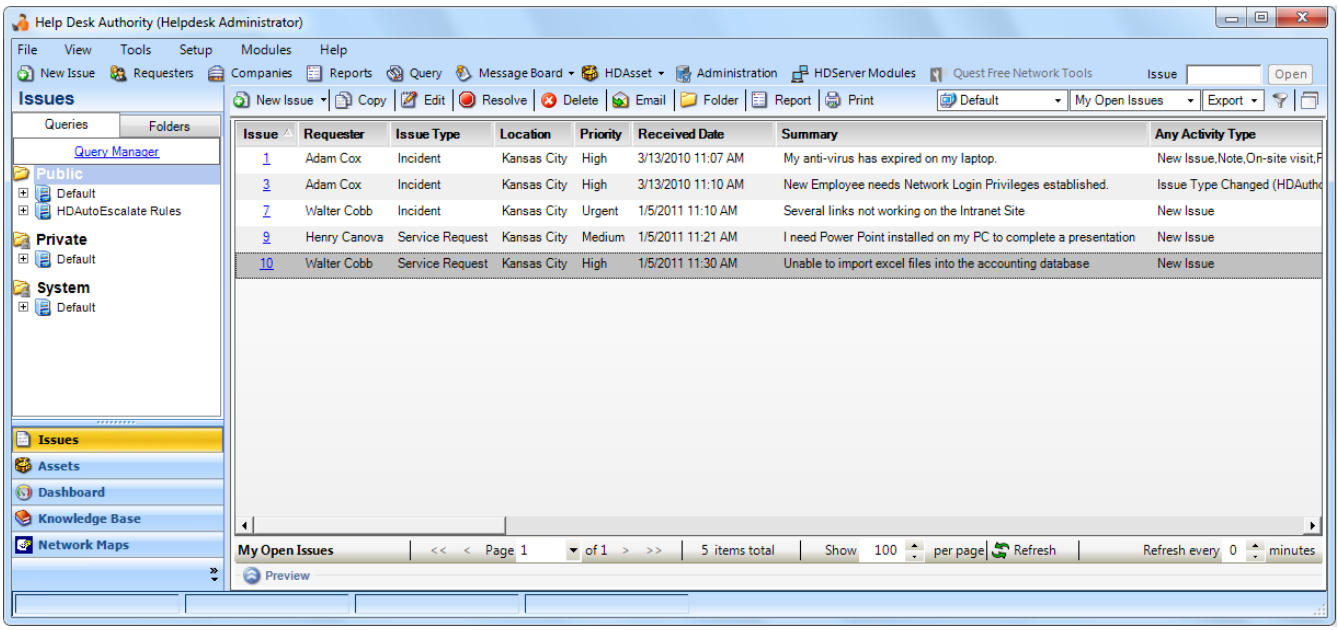
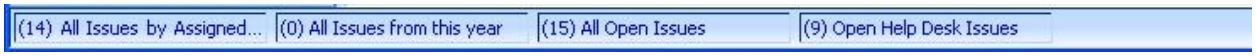

Help Desk Authority (Helpdesk Administrator)
File View Tools Setup Modules Help
New Issue Requesters Companies Reports Query Message Board HDAsset Administration HDServer Modules Quest Free Network Tools Issue Open
Issues
New Issue Copy Edit Resolve Delete Email Folder Report Print Default My Open Issues Export
Queries Folders
Query Manager
Public
Default
HDAutoEscalate Rules
Private
Default
System
Default
Issues
Assets
Dashboard
Knowledge Base
Network Maps
Issue Requester Issue Type Location Priority Received Date Summary Any Activity Type
1 Adam Cox Incident Kansas City High 3/13/2010 11:07 AM My anti-virus has expired on my laptop. New Issue,Note,On-site visit,F
3 Adam Cox Incident Kansas City High 3/13/2010 11:10 AM New Employee needs Network Login Privileges established. Issue Type Changed (HDAuth
7 Walter Cobb Incident Kansas City Urgent 1/5/2011 11:10 AM Several links not working on the Intranet Site New Issue
9 Henry Canova Service Request Kansas City Medium 1/5/2011 11:21 AM I need Power Point installed on my PC to complete a presentation New Issue
10 Walter Cobb Service Request Kansas City High 1/5/2011 11:30 AM Unable to import excel files into the accounting database New Issue
My Open Issues << < Page 1 of 1 > >> 5 items total Show 100 per page Refresh Refresh every 0 minutes
Preview

The Status Bar

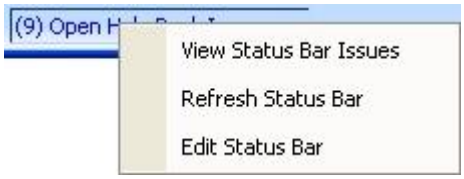
At the bottom of the Help Desk Authority window is the Status Bar, as shown below. The Status Bar displays the queries that are open as selected in the Query Manager (see Chapter 6, The Query Manager, for more information).



Queries and The Status Bar

From the Query Manager, you can select which queries will appear in the Status Bar. In the above example, four default queries have been selected. The query name is preceded by the number of issues in parentheses.

When you right-click on any of these queries, Help Desk Authority will display the menu, shown below:



Click on:	To:
View Issues	Display the issues that satisfy the query.
Refresh Status Bar	Run the queries and refresh the Status Bar to reflect any new issues that have been entered.
Edit Status Bar	Open the Query Manager where you can make any necessary changes.

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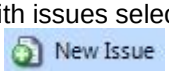
You may also double click on a query in your status bar to open the corresponding list of issues.

Creating a New Issue

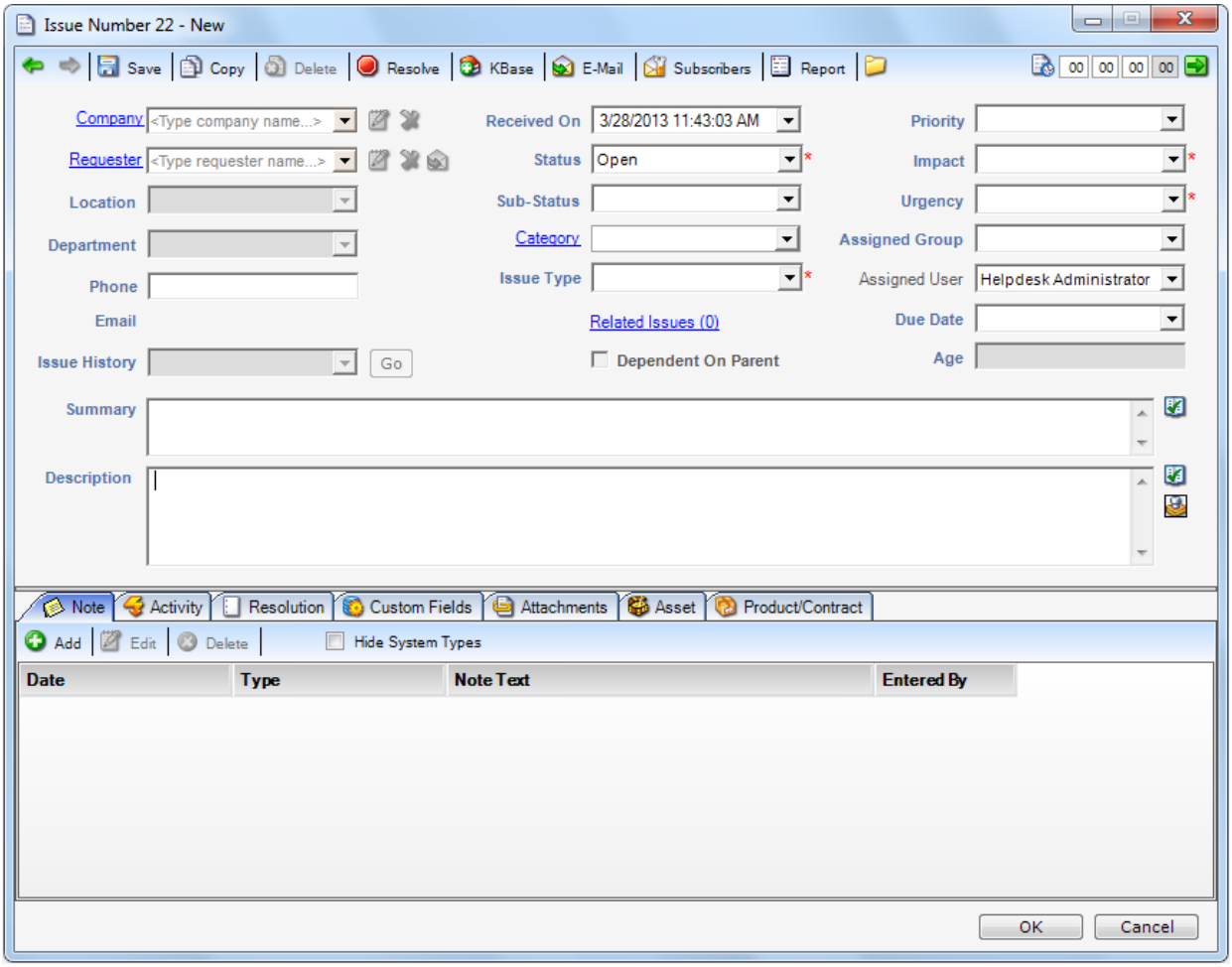
The main function of Help Desk Authority is issue management. From creation to resolution, issues are tracked and updated through the various tools the application has to offer. When your help desk receives a call, most of the time it will be for a new issue.

The Issue Window

In the main window, with issues selected in the Navigation pane, click the

icon. Or, in the main toolbar, click the 

icon. Alternately, you can choose **File** > **New** > **New Issue** from the main menu. This will open the Issue # - New window, where the # represents the issue number of the new issue. An example of the window is shown below.



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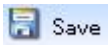
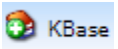
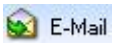
The Issue Window Toolbar

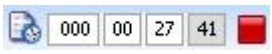
At the top of the New Issue window is the issue window toolbar as shown below. In the table following, each icon is explained. Note that using the ALT key will allow you to use keyboard shortcuts for toolbar items. Each keyboard shortcut is noted in the table below.

Icon	Result
	Move forward or backward to the next or last issue.
	Save the issue. (ALT+S)
	Create a copy of this issue. For more information, see *The Issues Toolbar* section in *Chapter 4 – Issues*. (ALT+C)
	Delete the issue. (ALT+D)
	Give the issue a status of “Closed”. (ALT+R)
	Add the issue resolution to the Knowledge Base. (ALT+K)
	Email details about the issue based upon a pre-defined email template. (ALT+M)
	Manage HDMail Subscribers. Opens the Subscription Management window for the issue. The primary requester will automatically be subscribed to the issue. For more details, see *Subscription Management* below. (Alt key?)
	Open a Report window for the issue, generally for printing. (ALT+P)
	Place the issue into an issue folder. (ALT+F)

The Issue Timer

To the right of the Issue window toolbar is the issue timer. When working on issues, you will often have the need to keep track of the amount of time that is spent. When you begin work on an issue, click the green start button.

The timer will run until you either save the issue or click the red stop button.



Help Desk Authority does not keep track of seconds when dealing with issue time. The seconds are rounded up or down to the nearest minute. When you re-start the timer, the seconds will be reset to zero and the minutes will be rounded to the nearest minute. The issue timer is covered in greater detail in Chapter 3.

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To Create a New Issue

1. In the New Issue window, select the company associated with the issue from the **Company** drop-down menu, or type the company name in the field. The field label for the **Company** field is also a link that will open the Companies window. You can search for a company based on a set of criteria and then select a company to use for this field.
2. Select the name of the requester associated with the issue from the **Requester** drop-down menu, or type the requester name in the field. The field label for the **Requester** field is also a link that will open the Requester window. You can search for a requester based on a set of criteria and then select a requester to use for this field.

If you have the "**Filter Requesters on Issue windows based on selected Company**" checkbox checked under Administration > **Configuration** > **System Options**, only those requesters associated with the chosen company will appear in the **Requesters** drop-down menu. If this option is not checked, the entire population of requesters will be available.
Also, if a requester that is not associated with the chosen company is selected, the company name will change in the New Issue window to reflect that requester.

3. There are three small icons next to the **Requester** field. They are described below.
4. View Requester. This will open the Requester – Edit window.
5. Clear Requester. This will remove the requester name from the **Requester** field.
6. Email Requester. This will compose an email to the requester.
7. In the **Location** field, if the location has not already been pre-populated due to the requester selection, use the drop-down menu to choose the location.
8. In the **Department** field, if the department has not already been pre-populated due to the requester selection, use the drop-down menu to select the appropriate department.
9. In the **Phone** field, if the phone number has not already been pre-populated due to the requester selection, enter the phone number.
10. In the **Email** field, a value will automatically populate if the selected requester has an email address. If not, this field will contain no value. The value that populates this field is an email link that can be used to send an email to the requester once the new issue has been saved.
11. In the **Issue History** drop-down, you can take a look at all issues for the selected company or requester. This is not a field that will retain your selection. It is a reference tool to be used when the field is created or edited. To view the selected issue history, click the **Go** button. This will open a new issue list window containing those selected issues.
12. The **Issue No** on the top of the window will be automatically populated with the new issue number.
13. In the **Received On** field, use the drop-down menu to select a date from the drop-down calendar. Initially, the date and time will be automatically populated with the current date and time. Both the date and time values can be edited or entered directly in the field if a change is necessary. You can enter the date and time in any format you like. Both values will automatically reset themselves to the correct format of m/d/yyyy and hh:mm:ss AM/PM.

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14. The **Status** field will be automatically populated with a value of “Open”. This can be changed by using the drop-down menu and selecting a value. This field is required.
15. If this issue requires a sub-status, use the **Sub-Status** drop-down menu and select a sub-status from the list.
16. In the **Category** field, select a category from the drop-down menu. The field label for the **Category** field is also a link that will open the Issue Categories window. You can select a category from the list and click the **Select** button, or you can create a new category to use by clicking the **Add** button and then clicking the **Select** button to use the new category. You can also create a sub-category from this window. You can add up to four levels of categories. Categories can also be edited or deleted by using the **Edit** or **Delete** buttons.
17. In the **Issue Type** drop-down menu, select an issue type. This field is required.
18. If the new issue is dependent upon a parent issue—meaning the parent issue must be resolved before the dependent (child) issue is resolved, check the **Dependent On Parent** checkbox.
19. In the **Priority** field, select the appropriate Priority from the drop-down menu.
20. In the **Impact** field, select the appropriate Impact from the drop-down menu. This is a required field.
21. In the **Urgency** field, select the appropriate Urgency from the drop-down menu. This is a required field.

You will notice that after selecting a Priority level, your selection may be automatically changed when you select an Impact and/or Urgency. These automatic changes are based upon Priority Mapping settings (covered in Chapter 3).

In the Priority Mapping section of the Administration window, if the checkbox labeled "**Automatically assign Issue Priorities based on Impact and Urgency**" is checked, your previously selected Priority level may be changed.

To gain more control over Priority settings, you will be able to go back to the Priority field and manually override the automatically selected Priority setting if the "**Allow users to manually override Priority settings**" checkbox has been checked in the Priority Mapping section of the Administration window.

22. In the **Assigned Group** field, select the group assigned to the issue (if applicable) from the drop-down menu.
23. In the **Assigned User** field, select the user assigned to the issue from the drop-down list. If an assigned group has been selected, the only users available in the **Assigned User** drop-down menu will be members of that group. The **Assigned User** field label is also a link that will open the Skills Based User window. To locate users in the Skills Based User window, select a Category/Skill from the left pane, then a Skill Level from the right pane. Click the **Refresh** button. All users matching the selected criteria will be listed in the Users list pane.

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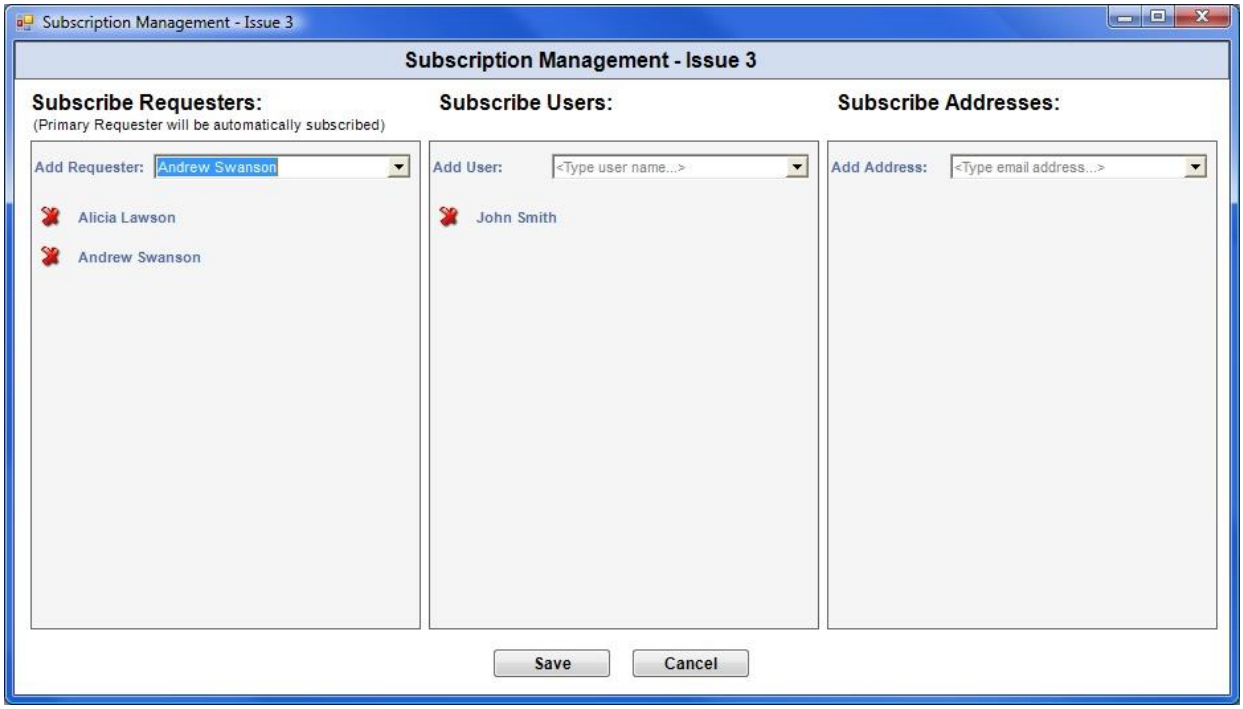
24. In the **Due Date** field, select the appropriate due date for the issue from the drop-down calendar. Both the date and time values can be edited or entered directly in the field if a change is necessary. You can enter the date and time in any format you like. Both values will automatically reset themselves to the correct format of m/d/yyyy and hh:mm:ss AM/PM.
25. The **Age** field will be automatically populated by Help Desk Authority.
26. The **Related Issues** link will open the Related Issues window. If you would like to establish a parent/child relationship between two or more issues, you can do so in this window. If a single issue is present in the list, and you would like to add an existing issue as its child, click the **Add Existing** button, enter the issue number, and click the **OK** button. If you would like to add an existing issue as the parent to the issue in the list, click the **Insert Existing** button, enter the issue number, and click the **OK** button. To use new issues as parents or children, use the **Add New** and **Insert New** buttons. You can also edit or remove an issue.
27. To add a summary to the issue, enter it in the **Summary** text field. To spell-check your entry, use the button.
28. To add a description to the issue, enter it in the **Description** text field. To spell-check your entry, use the green checkmark button. To place a time stamp on your entry, use the time stamp button.

Subscription Management



You can add additional requesters, users and additional email addresses to the subscription list by selecting them from the drop-down menus. To remove an individual from the list, click the red "**X**" icon next to the name. Click the **Save** button when finished.

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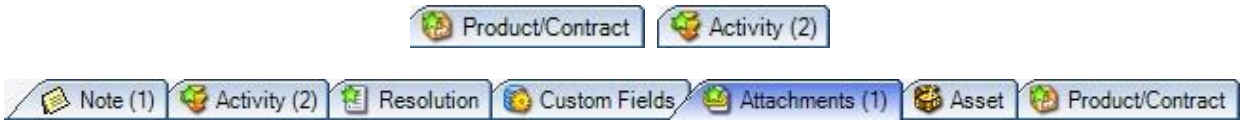
Tabs in the Issue Window

The bottom pane of the Issue window consists of seven tabs as shown below. Each tab will be explained in detail.

Note that if an icon on a particular tab has a green star affixed to it, this indicates that the tab has been updated and contains information. If the tab can contain only one piece of information, it will simply display the green star. If the tab can support multiple pieces of information, a count (in parentheses) will follow the tab label.



The Note Tab

To add an activity note to the issue:

1. Click the **Add** button. This will open the Activity Note – Add window.
2. Select the activity type in the **Activity Type** drop-down menu.
3. Select the user applicable to the note in the **Entered By User** drop-down menu.
4. The **Activity Date/Time** field will be automatically populated with the current date and time. To override this, you may select a date from the drop-down calendar or simple enter a date and time into the field. Help Desk Authority will convert your entry to the correct format of m/d/yyyy, hh:mm:ss, and AM/PM.
5. In the Time Spent section, if applicable, enter the time spent on this activity by using the **Days**, **Hours** and **Minutes** fields.
6. If there is a cost associated with the activity, the cost will appear in the **Cost** field. Note that this only occurs if the cost is based on days, hours or minutes. Customers with yearly or monthly contracts (one set price) will not see an amount in the **Cost** field.
7. If the cost for this activity is billable (in general, billable outside of a support contract, or when the existing contract is based upon time spent per incident), check the **Billable** checkbox.
8. Enter the text of the note in the **Note** field.
9. Use the if you wish to spell-check the note.
10. Click the **OK** button when finished. The new note will now be seen in the note list under the Note tab as well as the activity list under the Activity tab.
11. To edit a note, select the note and click the **Edit** button (or double-click the note itself). Edit the note and click the **OK** button when finished.
12. To delete a note, select the note from the list and click the **Delete** button. In the confirmation pop-up window, click the **OK** button.
13. To hide all system-generated activities from your list, check the **Hide System Types** checkbox.

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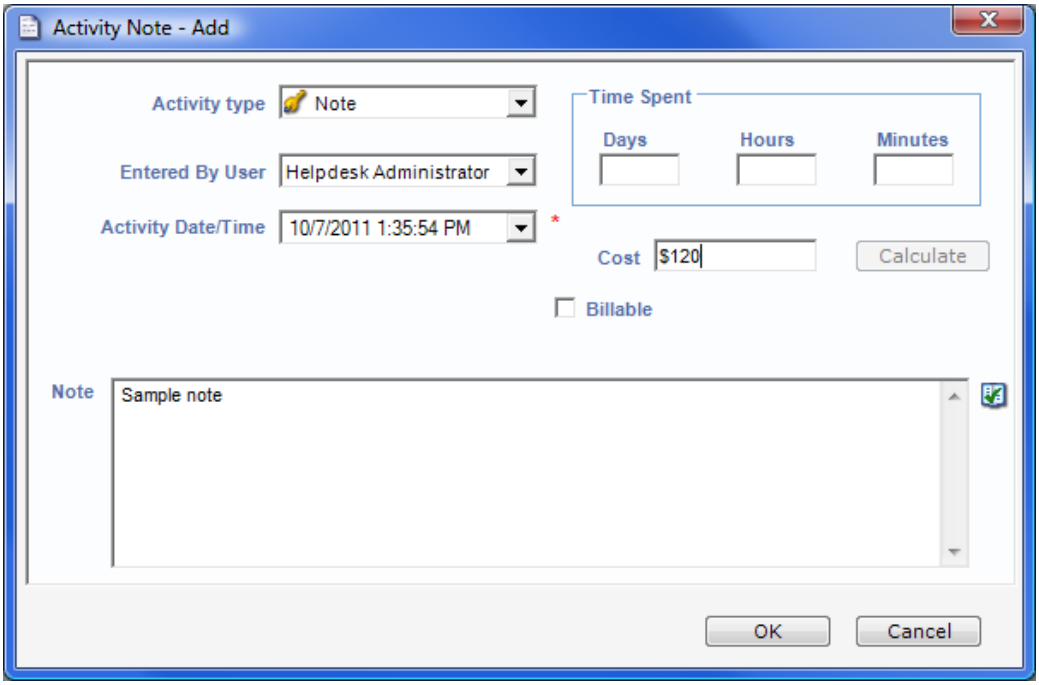

The Activity Tab

To add an activity to the issue:

1. Click the **Add** button. This will open the Activity Note – Add window.
2. Select the activity type in the **Activity Type** drop-down menu.
3. Select the user applicable to the note in the **Entered By User** drop-down menu.
4. The **Activity Date/Time** field will be automatically populated with the current date and time. To override this, you may select a date from the drop-down calendar or simply enter a date and time into the field. Help Desk Authority will convert your entry to the correct format of m/d/yyyy, hh:mm:ss, and AM/PM.
5. In the Time Spent section, if applicable, enter the time spent on this activity by using the **Days**, **Hours** and **Minutes** fields.
6. If there is a cost associated with the activity, the cost will appear in the **Cost** field. Note that this only occurs if the cost is based on days, hours or minutes, or if the cost is per incident. Customers with yearly or monthly contracts (one set price) will not see an amount in the **Cost** field.
7. If the cost for this activity is billable (in general, billable outside of a support contract, or when the existing contract is based upon time spent, such as an hourly rate, or if the cost is a set cost per incident), check the **Billable** checkbox.
8. Enter the text of the note in the **Note** field.
9. Use the if you wish to spell-check the note.
10. Click the **OK** button when finished. The new note will now be seen in the note list under the Note tab as well as the activity list under the Activity tab.
11. To edit an activity, select the note and click the **Edit** button (or double-click the activity itself). Edit the activity and click the **OK** button when finished.
12. To delete an activity, select the activity from the list and click the **Delete** button. In the confirmation pop-up window, click the **OK** button.

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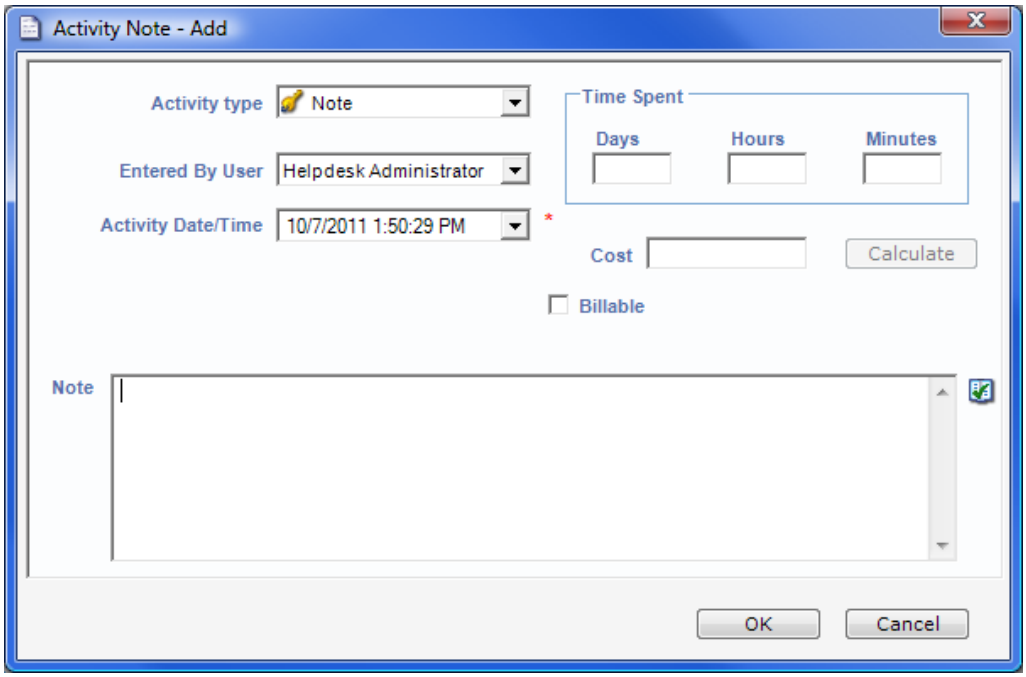
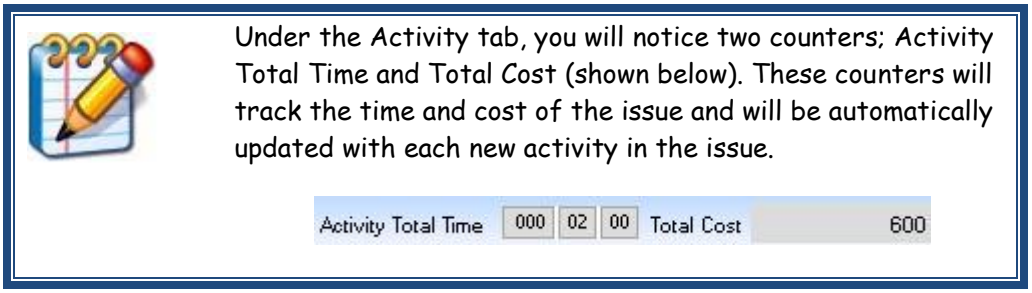
13. To hide all system-generated activities from your list, check the **Hide System Types** checkbox.




Under the Activity tab, you will notice two counters; Activity Total Time and Total Cost (shown below). These counters will track the time and cost of the issue and will be automatically updated with each new activity in the issue.
Activity Total Time
000
02
00
Total Cost
600

The Resolution Tab

There are two methods available to resolve an issue. As discussed earlier, you can click the **Resolve** button on the issue toolbar. You can also click the button under the Resolution tab. Both actions will populate the **Resolved By** and **Resolved Date** fields under the Resolution tab with the current user and the current date and time.

To resolve an issue from the Resolution tab:

1. Click the red resolution button ( ). This will populate the **Resolved By** and **Resolved Date** fields with the current user and the current date and time.
2. In the Resolution text area, enter any notes that are applicable to the resolution. Use the button to include the date and time of the note, and use the button to check the spelling of the note.
3. Click the **OK** button when finished, or select another tab to enter more information.

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The Custom Fields Tab

If there are any custom fields in the issue, they will appear here in the Custom Fields tab. Complete any custom fields that are necessary.

The Attachments Tab

Use the Attachments tab to include any attachments necessary in the issue.

1. To attach a file, click the **Attach File** button, browse to the correct file in the Open window and click the **Open** button. The file will now be attached to the issue.
2. To attach an Item or items on the clipboard, click the **Attach Clipboard** button. The file(s) from the clipboard will now be attached to the issue.
3. To attach a URL, click the **Attach URL** button. This will open the Attach URL window. Enter the Web Address (URL) in the **Web Address** field, then enter a description in the **Description** field (both fields are required). Click the **OK** button when finished. Note that you must include “http://” with the URL.
4. To open an attachment, right-click on the attachment and select the application you would like to use to open the file, or select the attachment and click the **Open With** button, then select the application of your choice.
5. To delete an attachment, select the attachment and click the **Delete** button, then click **OK** at the prompt.
6. Click the **OK** button when finished, or select another tab to enter more information.

The Asset Tab

The Asset tab allows you to associate an asset or assets to the issue if necessary.

1. The **Asset** field label is a link. Click it to open the Assets window.
2. Use the query controls in the top section of the Assets window to view the list of assets available for this issue.
3. Select the name of the asset you wish to associate with the issue by clicking on the name. This will populate the fields in the Asset tab of the Issue window.
4. The name of the asset should now be present in the **Asset** field. To edit the asset, click the icon. To remove the asset from the issue, click the icon.
5. The remaining fields (**Tag**, **Asset Type**, **Manufacturer**, **Owner** and **Model**) will most likely be populated from the information in the Assets window. These fields cannot be edited. To change the values in these fields, open the asset in the Asset window, make the appropriate changes, then click the **OK** button.

The Product/Contract Tab

The Product/Contract tab allows you to attach a product and/or a contract to the issue. You can also attach a note in the bottom section of the tab if necessary.

To attach a product:

1. In the Product section, click the **Product** field label. It is a link that will open the Select Product window.
2. You will be presented with a list of products that are currently assigned to the company or the requester. Highlight the product you would like to attach to the issue and click the **Select** button.

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3. The product will now appear in the **Product** field. If a reference number and a PO number have been assigned to the product, they will appear in the **Reference No.** and **PO No.** fields. These fields cannot be edited.
4. Enter the version number in the **Version** field and the build number in the **Build** field if necessary.
5. To remove a product from the issue, click the icon.

To attach a contract:

1. In the Contract section, click the **Contract** field label. It is a link that will open the Select Contract window.
2. You will be presented with a list of contracts that are currently assigned to the company or the requester. Highlight the contract you would like to attach to the issue and click the **Save** button.
3. The contract will now appear in the **Contract** field. If a reference number and a contract type have been assigned to the contract, they will appear in the **Reference No.** and **Contract Type** fields. These fields cannot be edited.
4. When all fields and tabs have been completed, click the **OK** button to save the new issue.

Editing an Issue

In your daily support activities you will most likely open and update existing issues on a regular basis as you work toward the resolution of those issues.

1. Open the issue.
2. If anything has changed in the top portion of the issue, make those changes.
3. You will often be adding activities or notes to issues as you work toward a resolution. Use the Activity and Note tabs to add these if necessary.
4. Click the **OK** button when finished.

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Chapter 5 – Assets

Help Desk Authority provides an excellent means for keeping an inventory of your organization's assets. In addition to storing information such as serial numbers, locations, and manufacturers, you can also capture key information about the vendors who have sold or who are leasing the assets to you.

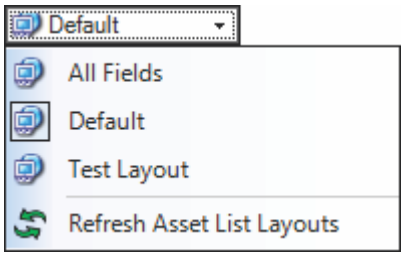
It is important to note that each asset must be assigned an asset type. Therefore, you must create at least one asset type. For example, if you choose not to categorize your assets by type, you can create one category called "Asset" and then assign this type to all assets that you create.

The Asset Toolbar

Icon	Result
New Asset	Add new asset. Opens the Asset Types window.
Edit Asset	Edit asset. Opens the Asset – Edit window.
Delete Asset	Delete asset. Deletes the selected asset.
Template	Asset templates. Opens the Asset Templates window.
Print	Print asset. Prints the asset.

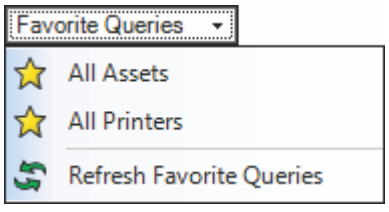
Next to the asset toolbar are two drop-down menus, described below.

The List Layout Menu



This drop-down menu allows you to choose which list layout to use. In the example above, the only available selection is "All Columns.". Select "Refresh Asset List Layouts" to make sure you have a complete list of all current asset list layout options.

The Favorite Query Menu



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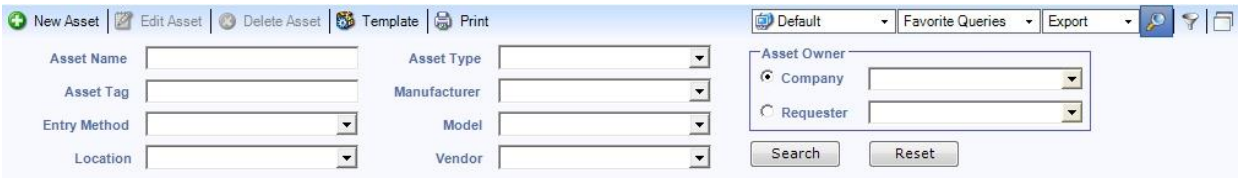
This drop-down menu allows you to determine which assets will appear in the Asset list.

View Separate Window Icon

The icon will break out the Asset List window into a separate window.

The Asset Search Pane

The icon next to the drop-down menus opens the **Asset Search Pane**, shown below.



In the Asset Search Pane, you can search for an asset using many different criteria.

1. Complete each field upon which you will be basing your search, either by entering a value directly or by using the drop-down menus.
2. Click the Search button.
3. To reset all fields back to blank at any time, click the Reset button.

To close the Asset Search Pane, click the icon.

The Asset Filter Pane

The icon next to the asset search icon opens the **Asset Filter Pane**. In the example below, the option has been selected to show the filter. The filter appears immediately above the Asset list.

From this view, the current query can be edited to suit your needs. The controls are very similar to the Query window controls.

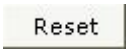
The button will remove the selected conditions from the query.

The

button will add a new condition to the query.

The

button will apply the changes you have made to the existing query.

The 

button will remove all conditions from the query.

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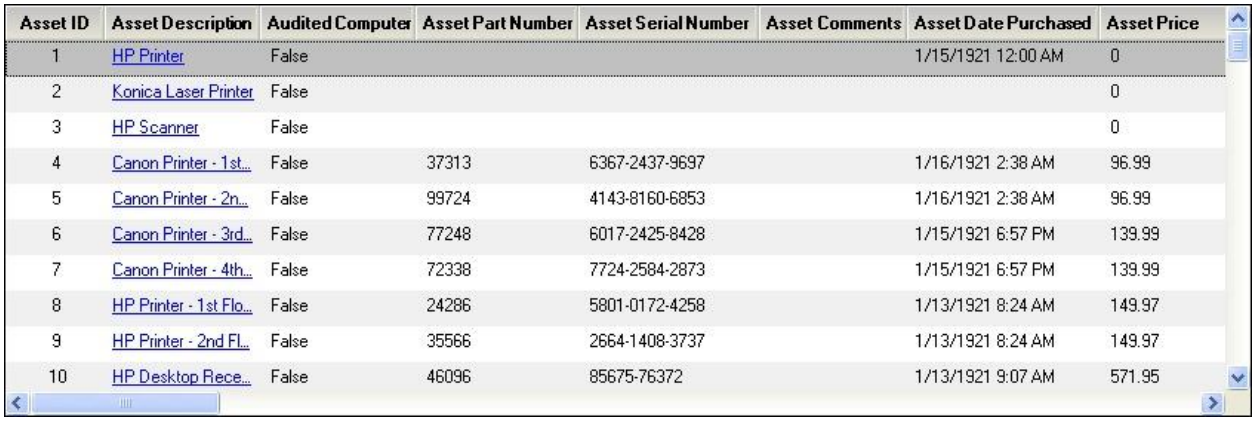
The Asset List Grid

The Asset list grid is the main area of the window when “Assets” is selected in the Navigation Pane. The asset list grid lists all the asset that match the criteria of the current asset list layout. You can display as much or as little information in the assets list as you like by customizing asset list layouts in the Administration window as discussed in the previous chapter. The example below shows the default “All Fields”. Notice the horizontal scroll bar at the bottom of the grid. Sliding the scroll bar to the right will reveal much more data than is shown in the current view.



Asset ID	Asset Description	Audited Computer	Asset Part Number	Asset Serial Number	Asset Comments	Asset Date Purchased	Asset Price
1	HP Printer	False				1/15/1921 12:00 AM	0
2	Konica Laser Printer	False					0
3	HP Scanner	False					0
4	Canon Printer - 1st...	False	37313	6367-2437-9697		1/16/1921 2:38 AM	96.99
5	Canon Printer - 2n...	False	99724	4143-8160-6853		1/16/1921 2:38 AM	96.99
6	Canon Printer - 3rd...	False	77248	6017-2425-8428		1/15/1921 6:57 PM	139.99
7	Canon Printer - 4th...	False	72338	7724-2584-2873		1/15/1921 6:57 PM	139.99
8	HP Printer - 1st Flo...	False	24286	5801-0172-4258		1/13/1921 8:24 AM	149.97
9	HP Printer - 2nd Fl...	False	35566	2664-1408-3737		1/13/1921 8:24 AM	149.97
10	HP Desktop Rece...	False	46096	85675-76372		1/13/1921 9:07 AM	571.95

The Refresh Pane

The refresh pane is located between the issue list pane and the preview pane. The refresh pane describes the contents of the issue list pane in overall detail.

- The first section displays the page number you are on and how many pages of results there are. You can jump to any page by using the drop-down menu.
- The third section gives the total number of results from the query.
- The fourth section displays how many results to display per page. You can enter any number from 1 to 999,999 by using the up and down arrow buttons or by entering in a number manually. The refresh icon ( ) next to the per-page count can be used at any time to update the issue list.

The Preview Pane

The preview pane (shown below) presents the user with a selection of details from the selected asset.

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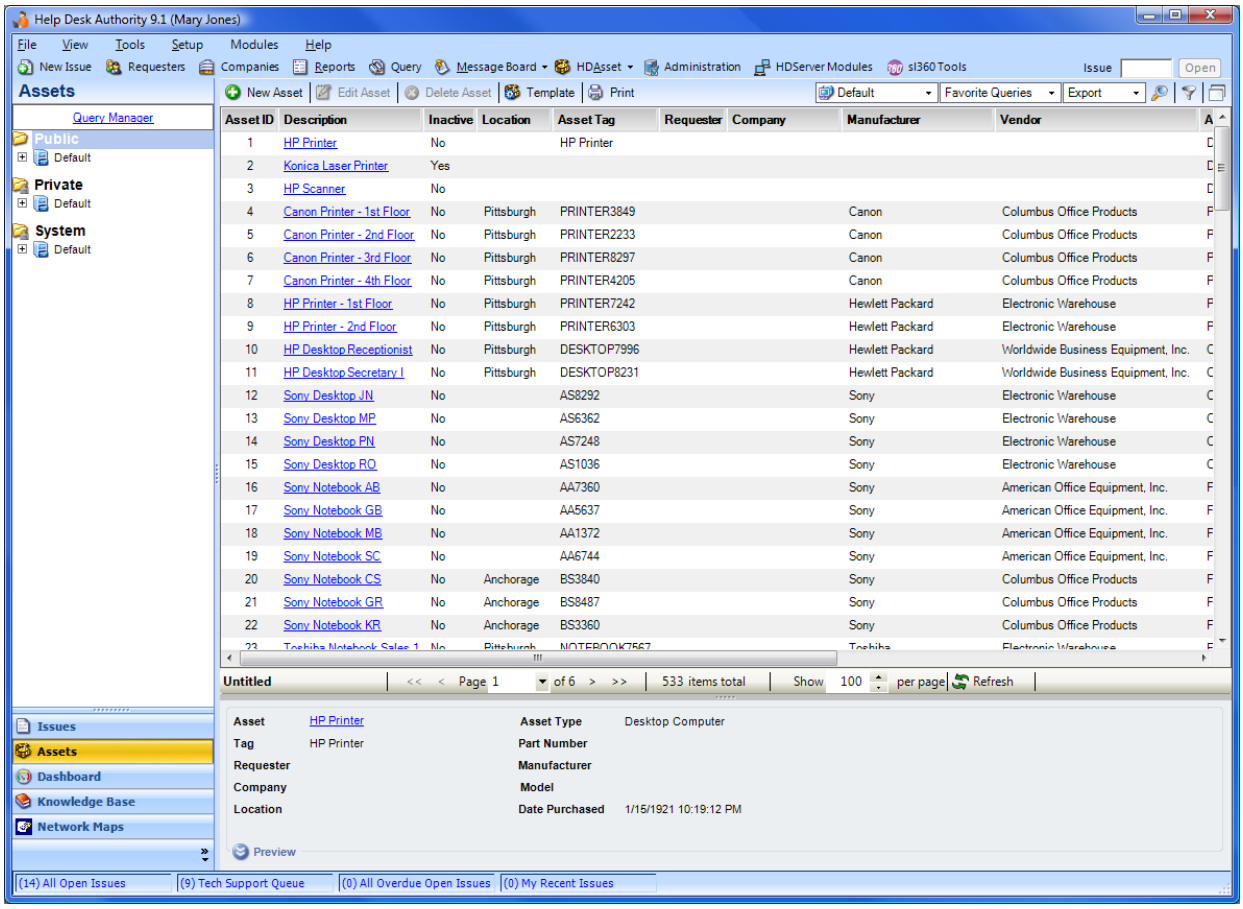
You can toggle the preview pane on and off by clicking the icon at the bottom of the page. Turning off the preview pane will allow you to view more assets in the asset list. Below is an example where the preview pane is hidden. You can un-hide the preview pane by clicking the icon at the bottom of the page.


Help Desk Authority 9.1 (Mary Jones)
File View Tools Setup Modules Help
New Issue Requesters Companies Reports Query Message Board HDAsset Administration HDServer Modules sl360 Tools Issue Open
Assets
New Asset Edit Asset Delete Asset Template Print Default Favorite Queries Export
Query Manager
Public
Default
Private
Default
System
Default
Asset ID Description Inactive Location Asset Tag Requester Company Manufacturer Vendor
1 HP Printer No HP Printer
2 Konica Laser Printer Yes
3 HP Scanner No
4 Canon Printer - 1st Floor No Pittsburgh PRINTER3849 Canon Columbus Office Products
5 Canon Printer - 2nd Floor No Pittsburgh PRINTER2233 Canon Columbus Office Products
6 Canon Printer - 3rd Floor No Pittsburgh PRINTER8297 Canon Columbus Office Products
7 Canon Printer - 4th Floor No Pittsburgh PRINTER4205 Canon Columbus Office Products
8 HP Printer - 1st Floor No Pittsburgh PRINTER7242 Hewlett Packard Electronic Warehouse
9 HP Printer - 2nd Floor No Pittsburgh PRINTER6303 Hewlett Packard Electronic Warehouse
10 HP Desktop Receptionist No Pittsburgh DESKTOP7996 Hewlett Packard Worldwide Business Equipment, Inc.
11 HP Desktop Secretary I No Pittsburgh DESKTOP8231 Hewlett Packard Worldwide Business Equipment, Inc.
12 Sony Desktop JN No AS8292 Sony Electronic Warehouse
13 Sony Desktop MP No AS6362 Sony Electronic Warehouse
14 Sony Desktop PN No AS7248 Sony Electronic Warehouse
15 Sony Desktop RO No AS1036 Sony Electronic Warehouse
16 Sony Notebook AB No AA7360 Sony American Office Equipment, Inc.
17 Sony Notebook GB No AA5637 Sony American Office Equipment, Inc.
18 Sony Notebook MB No AA1372 Sony American Office Equipment, Inc.
19 Sony Notebook SC No AA6744 Sony American Office Equipment, Inc.
20 Sony Notebook CS No Anchorage BS3840 Sony Columbus Office Products
21 Sony Notebook GR No Anchorage BS8487 Sony Columbus Office Products
22 Sony Notebook KR No Anchorage BS3360 Sony Columbus Office Products
Untitled << < Page 1 of 6 > >> 533 items total Show 100 per page Refresh
Asset HP Printer
Tag HP Printer
Requester
Company
Location
Asset Type Desktop Computer
Part Number
Manufacturer
Model
Date Purchased 1/15/1921 10:19:12 PM
Preview
Issues
Assets
Dashboard
Knowledge Base
Network Maps
(14) All Open Issues
(9) Tech Support Queue
(0) All Overdue Open Issues
(0) My Recent Issues

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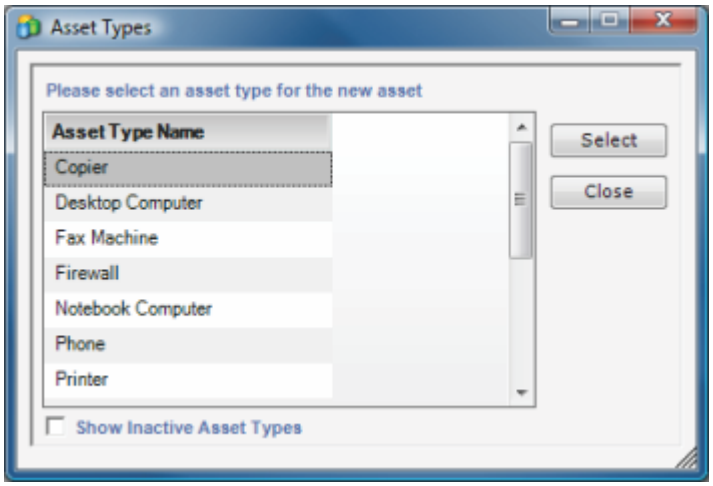
Creating a New Asset

The process for creating a new asset is quite a bit different than creating a new issue.

1. Click the

button. This will open the Asset Types window, displaying all known asset types.



2. Select the asset type for the new asset and click the **Select** button. This will open the Asset – Add window, shown below.

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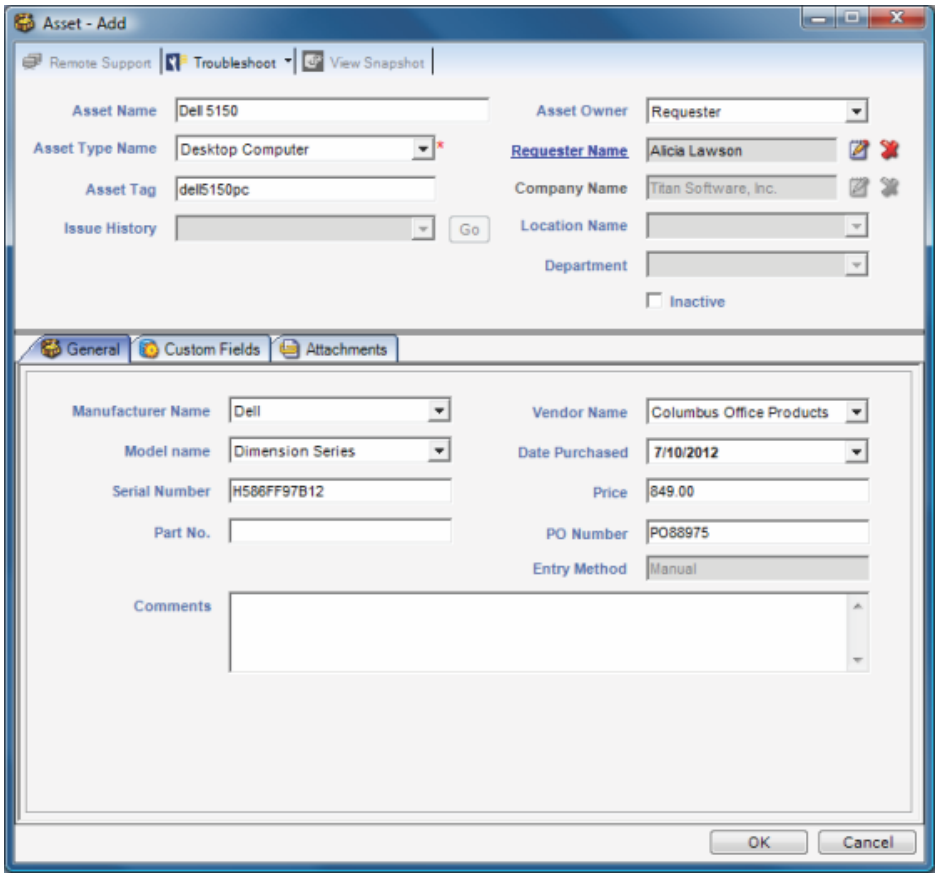

3. Enter the name of the asset in the **Asset Name** field.
4. The **Asset Type** field will already be completed from the prior step. This field is required.
5. Enter any asset tag information in the **Asset Tag** field.
6. If this is a new issue, you can ignore the **Issue History** field.
7. From the drop-down menu, select the **Asset Owner**. This will usually be requester or company.
8. Click the **Requester Name** field label. This is a link that will open the Requester window. Select a requester from the list of possible requesters.
9. Once a requester name has been chosen, the **Company Name**, **Location Name** and **Department** fields will be automatically populated if they are populated within the requester information.

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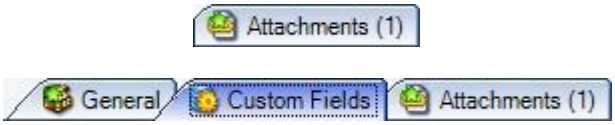
Tabs in the Asset – Add Window

The bottom pane of the Issue window consists of three tabs as shown below. Each tab will be explained in detail.

Note that if an icon on a particular tab has a green star affixed to it, this indicates that the tab has been updated and contains information. If the tab can contain only one piece of information, it will simply display the green star. If the tab can support multiple pieces of information, a count (in parentheses) will follow the tab label.



The General Tab

1. Select the manufacturer name from the **Manufacturer Name** drop-down menu.
2. Select the model type from the **Model** drop-down menu.
3. Enter the serial number in the **Serial Number** field.
4. Enter the part number in the **Part No** field if applicable.
5. Select the vendor name from the **Vendor Name** drop-down menu.
6. In the **Date Purchased** field, select the date from the calendar drop-down.
7. Enter the price in the **Price** field.
8. Enter the purchase order number in the **PO Number** field.
9. The **Entry Method** field will be completed automatically and cannot be edited.
10. Enter any comments you would like to make in the **Comments** text box.

The Custom Fields Tab

If there are any custom fields in the issue, they will appear here in the Custom Fields tab. Complete any custom fields that are necessary.

The Attachments Tab

Use the Attachments tab to include any attachments necessary in the asset.

1. To attach a file, click the **Attach File** button, browse to the correct file in the Open window and click the Open button. The file will now be attached to the issue.
2. To attach an Item or items on the clipboard, click the **Attach Clipboard** button. The file(s) from the clipboard will now be attached to the issue.
3. To attach a URL, click the Attach URL button. This will open the **Attach URL** window. Enter the Web Address (URL) in the **Web Address** field, then enter a description in the **Description** field (both fields are required). Click the **OK** button when finished. Note that you must include “http://” with the URL.
4. To open an attachment, right-click on the attachment and select the application you would like to use to open the file, or select the attachment and click the **Open With** button, then select the application of your choice.
5. To delete an attachment, select the attachment and click the **Delete** button, then click **OK** at the prompt.
6. Click the **OK** button when finished, or select another tab to enter more information.

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Editing an Asset

In your daily support activities you will most likely open and update existing assets.

1. Open the asset.
2. If anything has changed in the top portion of the issue, make those changes.
3. You will often be adding notes or attachments to assets. Use the General and Attachments tabs to add these if necessary.
4. Click the **OK** button when finished.

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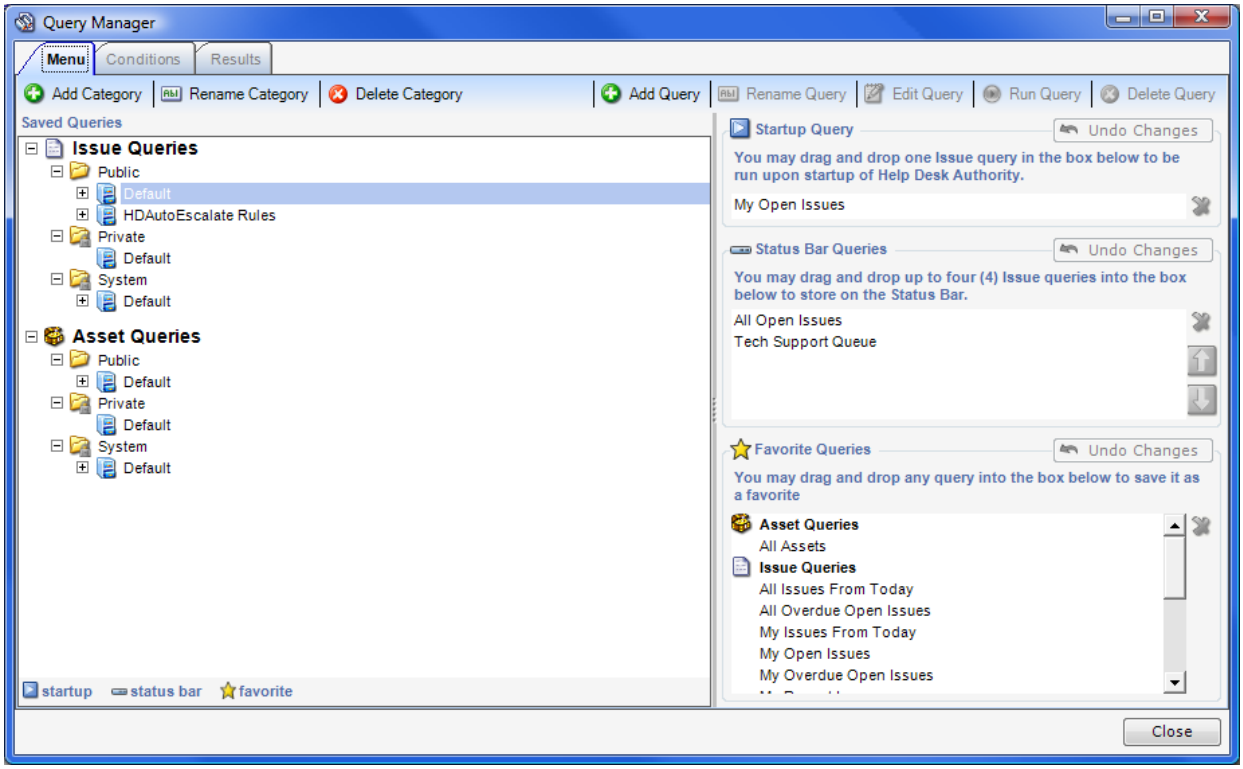
Chapter 6 – The Query Manager

Help Desk Authority gives you access to complete issue history through queries. Queries allow you to specify selection criteria for any issue field, including custom fields. For example, you may want to search for issues entered during a particular time period, or issues with a particular status, or containing a certain word in the Description.

Regardless of the search you specify, you can save your queries and run them at any time. Saved queries can also be used for reports.

To access the Query Manager, click on the

icon in the Help Desk Authority toolbar. You can also use the Main menu and select **Tools** > **Query**. Both methods will open the Query Manager, shown below.



There are three tabs in the Query Manager:

- The Menu Tab – Where queries are categorized are managed.
- The Conditions Tab – Where new queries are created by adding conditions.
- The Results Tab – Where the results of queries are displayed.

Each tab will be described in detail during this chapter.

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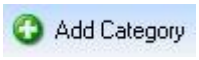
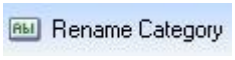
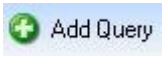
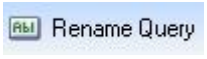
The Menu Tab

The Menu tab is where all queries are managed. There are three main sections of the menu tab.

- The Toolbar
- The Saved Queries section
- The Startup, Status Bar and Favorite Queries section

The Toolbar

Toolbar Item	Result
	Click to add a new query category.
	Select a query category and click this button to rename.
	Select a query category and click this button to delete it.
	Click to add a query. Opens the Conditions tab.
	Select a query and click this button to rename it.
	Select a query and click this button to edit it (opens the Conditions tab).
	Select a query and click this button to run it (opens the Results tab).
	Select a query and click this button to delete it.

Creating / Editing a Query Category

Queries are organized into categories. These categories are arranged into folders in a directory. The two main folders are Issue Queries and Asset Queries. Both of these main folders contain two main folders; Public and Private. The Public and Private folders are system-defined. You can define as many sub-categories under these two folders as you like.

Queries that are filed in the Public folder are available for anyone to use. Queries that are filed in the Private folder are only accessible to the user who defined the folder.

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To Create, Rename or Remove a Query category:

1. Choose a Main category for your query (issue or Asset), and then select the Public or Private folder.
2. Click the **Add Category** icon.
3. Enter a name for the new category.
4. Press **Enter**.
5. To rename a category, either double-click the category or select it and click the **Rename Category** icon. Enter the new name and press **Enter**.
6. To remove a category, select the category and click the **Delete Category** icon. When prompted for verification, click the **Yes** button.

Organizing Queries

Aside from the folder structure of query organization, there are three other categories that queries can be placed in:

- Startup Queries ( )
- Status Bar Queries ( )
- Favorite Queries ( )

Startup Queries

You can designate one query as a Startup Query. This query will run upon the startup of Help Desk Authority. To do this, simply drag one query from the folder tree and drop it into the field in the Startup Queries section. If an existing query is already set as a Startup Query, simply dragging another query to the same location will replace it.

To remove the current Startup Query without replacing it, select the query and click the .

Status Bar Queries

Status Bar Queries are those queries that will be stored on the Status Bar to be run at your convenience just by double-clicking them. You can designate up to four queries to be Status Bar Queries. Simply drag a query from the folder tree and drop it into the Status Bar Query area. You can change the order of the queries on the status bar by moving them up or down with the arrow buttons.

If you want to replace an existing Status Bar Query with another query, you must first remove the query to be replaced. Select that query and click the . This will remove it from the Status Bar Query list but it will not be deleted.

Favorite Queries

Any query can be saved as a Favorite Query. Simply select a query and drag it to the Favorite Query section. It will appear in any Favorite Query drop down.

To remove a query from your Favorites, select the query and click the .

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The Conditions Tab

The Conditions tab is where all queries are created and edited.

To open the Conditions tab, either click the **Add Query** button on the Menu tab, or select a query and click the **Edit Query** button.

At the top of the Conditions tab is a toolbar with four buttons.

Button	Result
Reset	Resets the query to its original state or an empty state.
Save	Saves the query.
Save As	Saves the query in a designated location in the folder tree.
Run Query	Runs the query (and opens the Results tab).

Creating / Editing a Query

To create a new query:

1. With the category of your choice selected, click the **Add Query** button. This will open the Conditions tab.
2. Add a condition.
3. Select a condition (operand) (see *Query Building*) you would like to add to the query.
4. Click the **Add Condition** button.
5. Modify the condition if necessary with operators (see *Query Building*).
6. Add more conditions if necessary
7. Run the query as a test. This will open the Results tab.
8. If the query meets your expectations, go back to the Conditions tab and save the query.
9. To edit an existing query, select the query in the Menu tab and click the **Edit Query** button. This will open the Conditions tab for editing. Change the query to your specifications and save.
10. To delete (remove) a query, select the query in the Menu tab and click the **Remove Query** button.

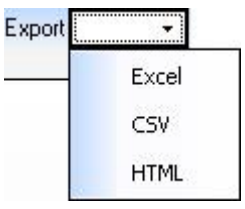
The Results Tab

The Results tab displays the results of the current query.

The **Query Layout** drop-down menu allows you to choose the format in which the results will appear (based upon pre-defined issue list layouts).

Also in the Results tab is a Refresh pane similar to the Refresh pane in the Issue window.

In the upper-right corner of the Results tab is the **Export** drop-down menu.



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Any set of query results can be exported to Excel, HTML or as a CSV text file.

Query Building

Building queries can be simple or complex depending upon your needs. Building a query is not always intuitive, especially if you have no database experience. Help Desk Authority has simplified the process to allow even a beginning user to develop a wide range of queries without regard to complexity.

In this section we will cover the concepts you should be familiar with to build any query you desire.

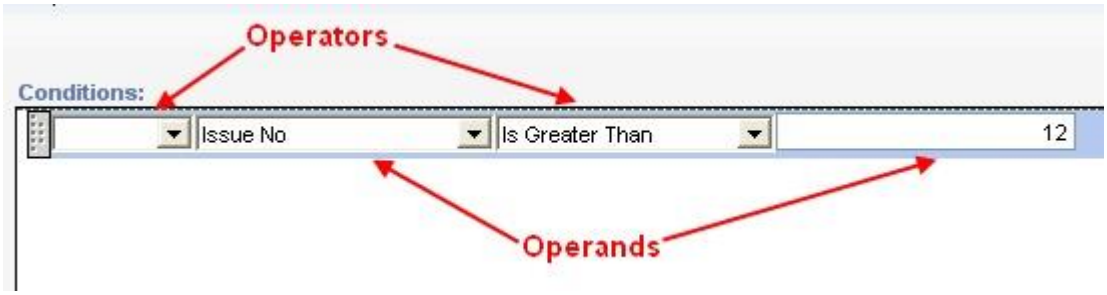
Query Elements

There are various elements to queries that will help you understand how they are built and how the different elements interact.

The first element is the *operand*. The operand is the condition or element (in the case of Help Desk Authority, the operand is usually a field) that is to be the subject of a comparison in order to produce a subset of data. In Help Desk Authority, some common operands are Issue No., Status, Contract, Asset, Requester and Impact.

The second (and related) element is the *operator*. The operator is the element that defines the comparison. In query building, some common operators are Equals, Is Greater Than, Is Less Than, Is In, and Is Between. These would be considered primary operators. There are also secondary operators that are used when comparing two or more conditions. Examples of secondary operators would be Or, And and Not.

Example 1: A simple query condition.



In the example above, the query will return all issues where the Issue No (operand) is greater than (operator) 12 (operand).

To add an operator to a condition, select the condition and use the drop-down menu to select an operator OR use the **Not**, **And** and **Or** buttons. If a particular operator is not available for the currently selected condition, the operator will not appear in the drop down menu, and if the button is clicked, nothing will happen.

In the next example, we will add another operator.

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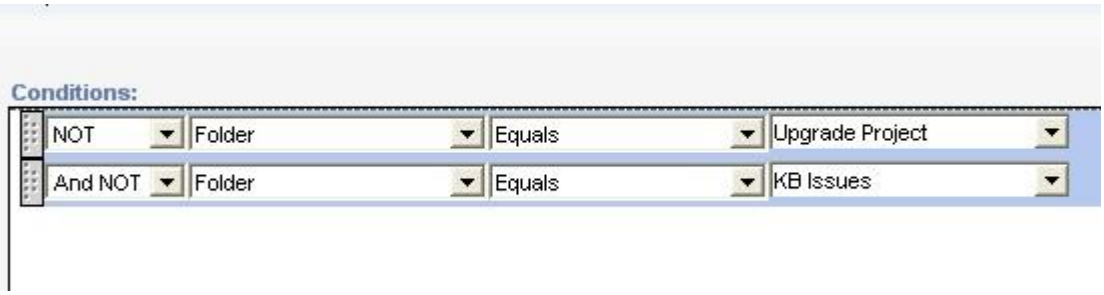
Example 2: A query condition with two operators

In this example, we have added the NOT operator. This query will return all issues where the folder name does NOT equal “Upgrade Project”.

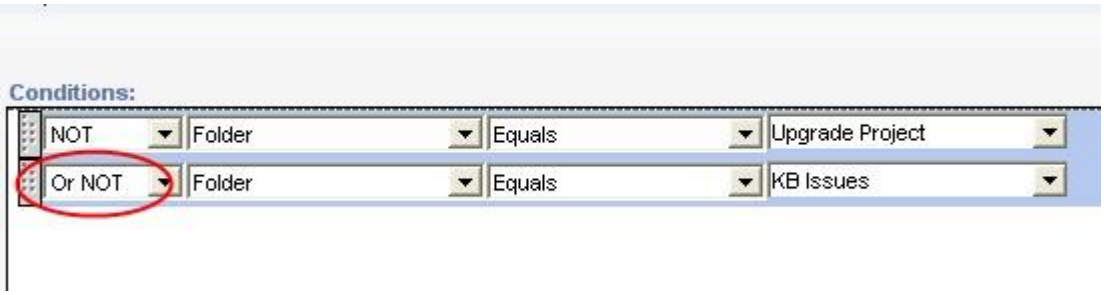
If you need a more complex query to suit your needs, you can add another condition.

Example 3: A query with two conditions



In this example, we have added another condition to the previous example. This query will now return all issues where the folder name does not equal “Upgrade Project” AND does not equal “KB Issues”. Thus, the issue must meet both conditions to be returned in the query.

Do not confuse this with the example below.



In this case, we used “Or NOT” instead of “And NOT”. Using “Or NOT” means that only one condition must be met to return the issue. So if an issue with a folder name of “KB Issues” came through this query, it would pass the first condition but not the second. And since only one condition must be met, this issue would be returned in the query. In the prior example, it would not be returned because it would have to meet both conditions.

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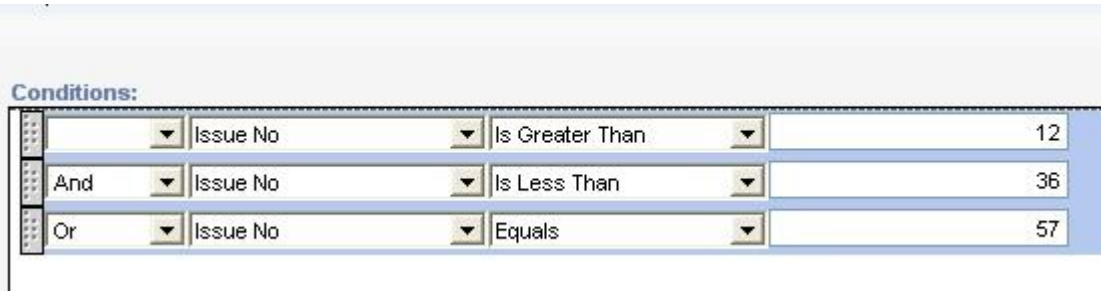
Example 4: A query with three conditions



Often, you will want to return issues that meet a very specific set of conditions. For example, the above query will return all issues where the issue number is between (but not including) 12 and 36, OR and issue where the issue number equals 57 (there is only one, of course).

Although effective, queries like this and others that are even more complex require something to make them simple. This is where grouping comes in.

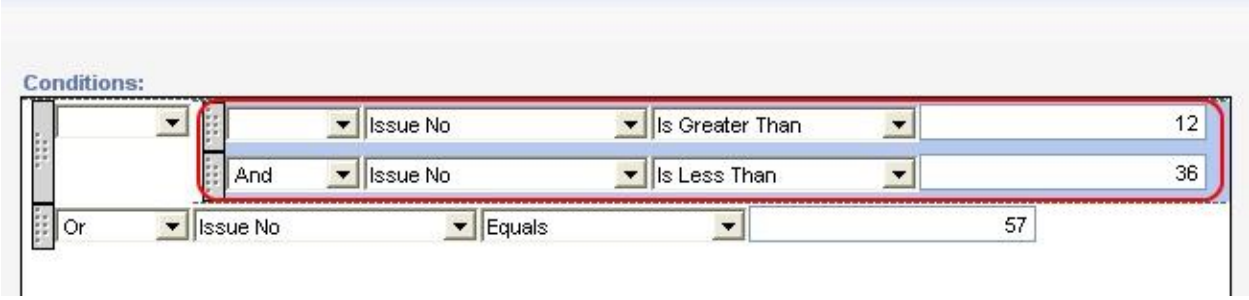
Grouping

Grouping is simply joining two or more conditions together for simplicity.

To group conditions:

1. Select the first condition to be grouped by clicking on it.
2. Select the second condition to be grouped by using **Shift-click**. Both conditions will now be highlighted. Note that you can only group adjacent conditions together. If you want to group two conditions that are not adjacent in the list, you can move a condition by clicking on the handle and dragging it to the desired location in the list.
3. Click the **Group** button.
4. To ungroup conditions, select the group and click the **Ungroup** button.

Example 1: Grouping two conditions in a three-condition query



This is the same query from Example 4 in the last section, and it will return the same result, but in this case, the first two conditions have been grouped together. In a query like this, grouped conditions are performed first before other conditions. It may be helpful to think of the grouped conditions as being enclosed in parenthesis, such as in a math problem:

(If the issue number is greater than 12 and less than 36**)** OR If the issue number is 57.

Let's take a more complex example. Suppose you want to see all issues within a certain due-date range that also contain either one of two different Priorities. This would be fairly complicated to do without grouping conditions.

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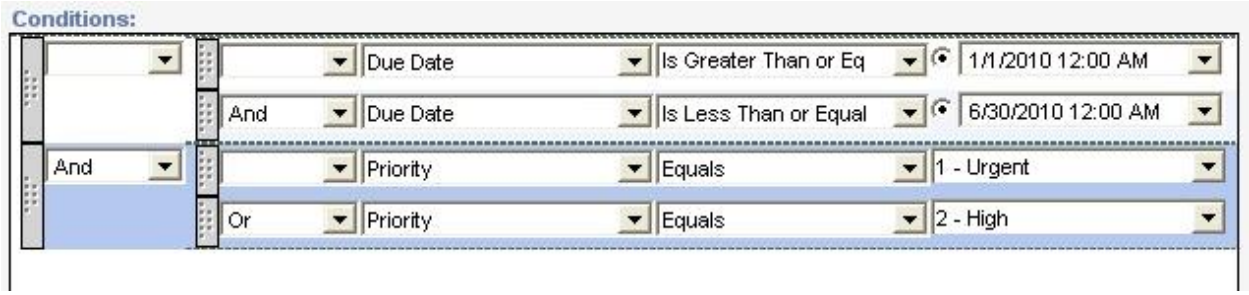
Example 2: A query with two sets of grouped conditions

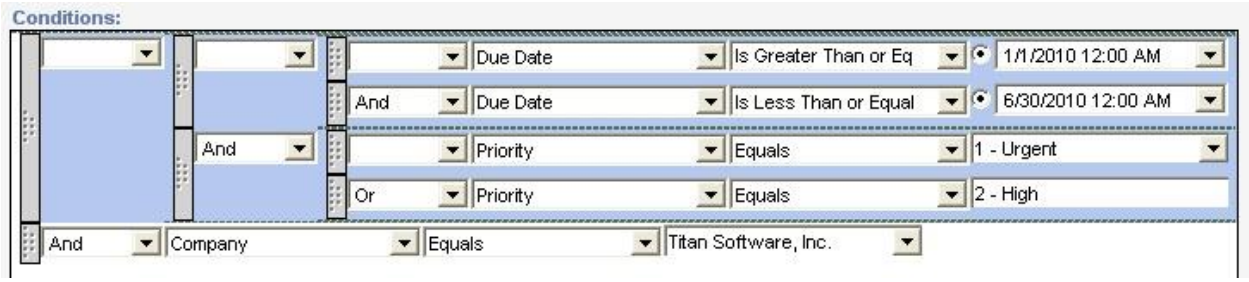


This query will return all issues with a due date between (and including) January 1, 2010 and June 30, 2010 **AND** have a Priority of 1 - Urgent or 2 - High. The issue must meet the group of Due Date conditions AND the group of Priority conditions in order to be returned.

Represented another way:

(If the Due Date is between 1/1/2010 and 6/30/2010 inclusive**)** AND **(**The Priority is either 1 – Urgent Or 2 – High**)**

Example 3: A query with two sets of grouped conditions plus a single condition



In this final example, this fairly complex query groups two groups into a single group, then adds one more condition. This query will return any issue where “Titan Software, Inc.” is the company, and the Due Date of the issues range from 1/1/2010 to 6/30/2010, and the issue has a Priority of 1 – Urgent or 2 – High.

[(If the Due Date is between 1/1/2010 and 6/30/2010 inclusive**)** AND **(**The Priority is either 1 – Urgent Or 2 – High**)]** And the company Name is “Titan Software, Inc.”

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Chapter 7 – Reports

Help Desk Authority supplies a comprehensive library of reports to assist you in your issue management procedures. Help Desk Authority's standard reports were created with the report-writer Active Reports® by Data Dynamics.

For customers with unique needs who design their own reports, Crystal Reports are available. You can design the reports you need to your exact specifications, then launch them from the Help Desk Authority interface. Please note that the Help Desk Authority filtering features (query, status and date filters) are not available for use with reports that are custom designed with Crystal Reports. For more information, see the Crystal Reports website at http://www.crystalreports.com.

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The Standard Help Desk Authority report categories and reports are listed in tree-form below.

- Assets
  - Assets by Company
  - Assets by Requester
  - Assets by Type
- Company/Requester
  - Company/Requester Listing
- Contracts
  - Contract-Remainder
  - Contracts by Product
  - Support Contracts
- Custom Reports
- HDAsset Reports
  - Application Installation Checklist
  - Application Installation List
  - Application License Usage
  - Change Tracking
  - Computer Application List
  - Computer Hardware List
  - Computer Summary Report
  - Graph - Application Installations by Manufacturer
  - Graph - Computers by Assignment
  - Hardware Installation List
  - Hotfixes
  - Screen Savers
- Issues
  - Billing Summary
  - Deleted Issues
  - Due Dates by Company
  - Due Dates by Group
  - Issue Detail by Company
  - Issue Detail With Activities
  - Issue Details
  - Issue Report by Assigned Person
  - Issue Summary
  - Issue Summary by Company
  - Issue Summary With Activities
  - Related Issues
  - Summary - Calls by User
  - Summary - Calls by Category
- Issues-Graphical
  - Graph - Average Time Spent By Categories
  - Graph - Average Time Spent By Users
  - Graph - Issues by Category and Status
  - Graph - Issues by Month
  - Graph - Issues by Received Days of Week
  - Graph - Issues by Received Hours and Status
  - Graph - Issues by Requester
  - Graph - Issues by User and Status
  - Graph - Issues by Week
  - Issues by Received Hour/Status and Priority
  - Percentage of Issues
- Issues-Statistical
  - Activity Stats By Technician/Requestor/Activity Type
  - Average Issues Per Week
  - Issue Count by Assigned Person and Status
  - Issue Report by Category
  - Issue Volume by Company(Top 10)
  - Issue Volume by Company/Requester
  - Issues By Department
  - Issues By Type
  - Ratio of Solved Issues by Category
  - Statistical Report by Assigned Users
  - Statistical Report by Category
  - Statistical Report by Priority
  - Statistical Report by Priority/SLA
  - Statistical Volume by Assigned User
- Knowledge Base
  - KB Details
  - KB Self-Service Statistics
  - Modified KB Articles
  - New KB Articles
  - Related Articles
- Master Table Reports
  - Asset Manufacturers
  - Asset Types
  - Asset Vendors
  - Departments
  - Issue Activity Types
  - Issue Categories
  - Issue Types
  - Priorities
  - Sub-Status Codes
- Products
  - Products
  - Products by Company/Requester

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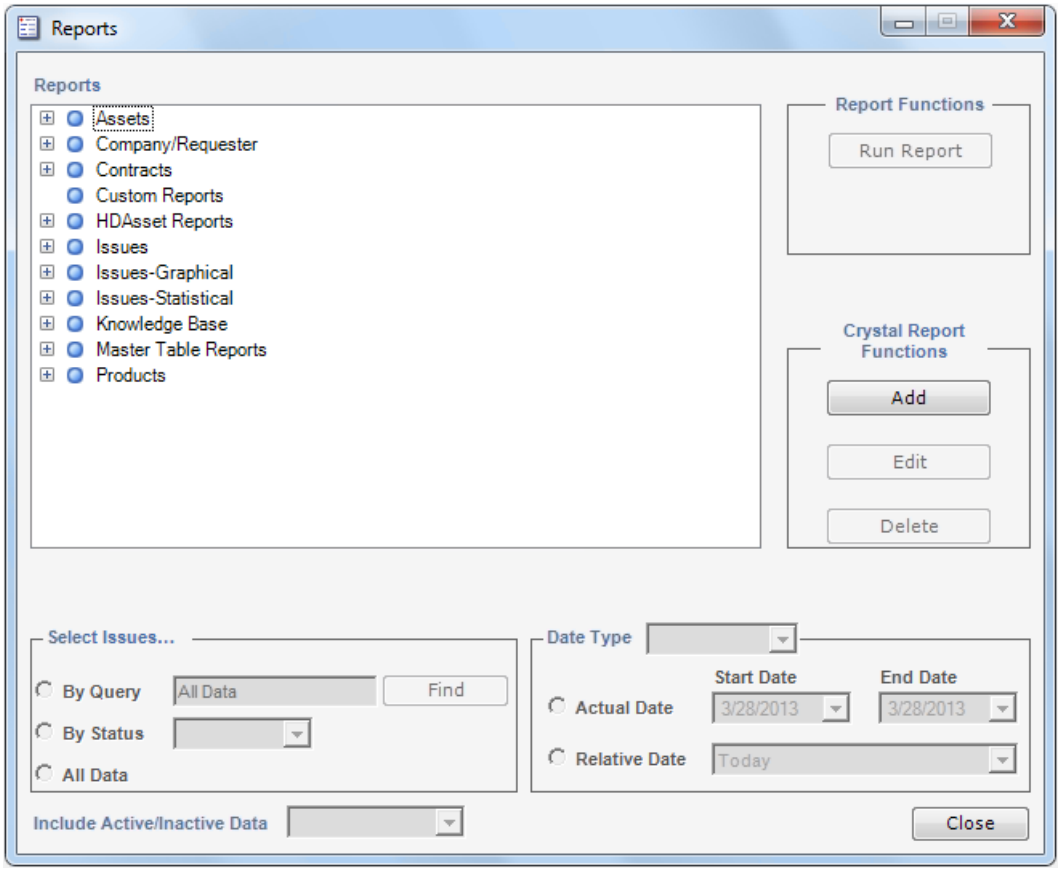
Standard Reports

To run a standard report:

1. Click the **Reports** icon in the toolbar, or from the Main menu, select **Tools** > **Reports**. This will open the Reports window as shown below.



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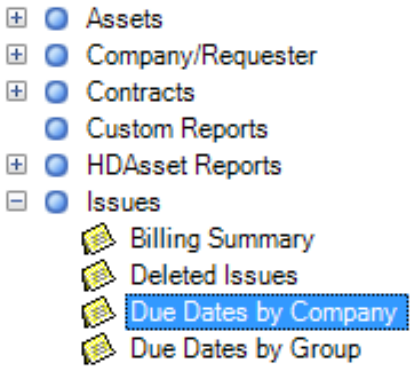
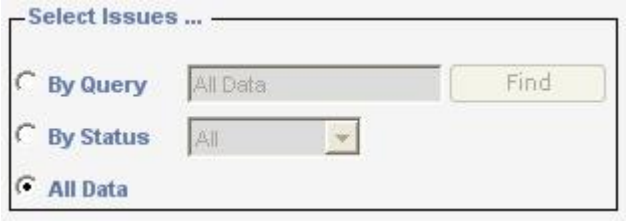
2. The report categories are in tree-structure. Expand a category by clicking the "+" before the category, then select the report you wish to run.



3. If available, **Select Issues** By Query, By Status or All Data. In the "Select Issues . . ." section (shown below), select the issue data you would like to see in the report.



Choose	To
By Query	Use the data resulting from a predefined Query in the report. When you choose the **By query** radio button, the **Find** button is enabled. Clicking the **Find** button will open the Query Manager window where you can select the query you would like to use. At report run time, the query will be executed and the report will be generated using the data resulting from the query.
By Status	Base the report only on issues with a particular status. When you select the **By Status** radio button, the drop-down menu will be activated. Select the status that you want to include in the report.
All Data	Base the report on all issue data.

These options are only available in reports from the Issues category, as well as the "Percentage of Issues" Report in the Issue-Graphical category.

4. In the Date Type pane, if available, select the **Date Type**. You have three choices; Date Received, Date Resolved and Due Date. You can set a date range by checking the **Actual Date** radio button, or you can use a specific recent date with the **Relative Date** radio button.

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It should be noted here that date ranges are now inclusive of their start and end dates. In previous versions of Help Desk Authority, these dates were excluded from the range.

Also, keep in mind that many reports will be prompting you for additional information before running the selected report. In some cases, this includes the option of setting an additional date range that is unrelated to the Date Type date range option. Neither of the two date ranges will override the other since they are referring to different elements of the report.

5. If available, complete the **Include Active/Inactive Data** drop-down menu. The selections are explained below.

Choose	To
All Data	Include records with both an “Active” and an “Inactive” designation
Active Data Only	Include only those records with an “Active” designation
Inactive Data Only	Include only those records with an “Inactive” designation

6. Click the **Run Report** button.

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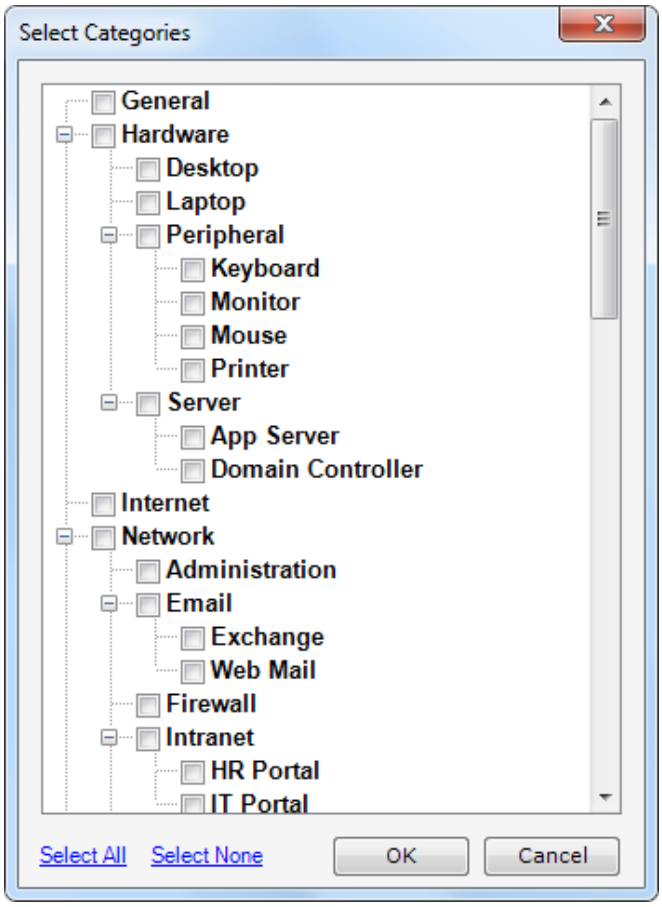
Report Prompts

Depending upon the report that you choose to run, Help Desk Authority may prompt you for additional information after clicking the **Run Report** button by opening certain windows for completion. These windows will be detailed in this chapter.

Category Selection Window

Reports used in:

- Graph - Average Time Spent By Categories
- Issue Report by Category
- Statistical Report by Category
- Summary - Calls by Category



In this window, you can select your categories individually, or click **Select All** or **Select None** to select or clear all of the items with a single click. Selecting a category will automatically select any child categories.

After making your selections, click the **OK** button.

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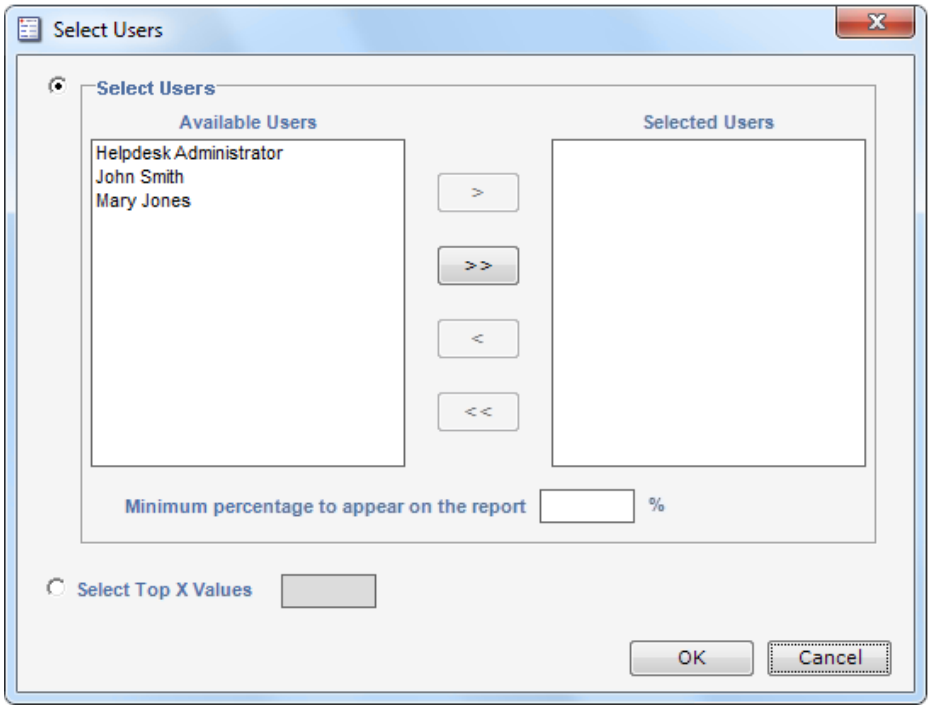
User Selection Window

Report used in: Graph - Average Time Spent By Users



In this window, you have two main selections: **Select Users** or **Select Top X Values**.

If you check the **Select Users** radio button, you will move users that are most frequently involved with your issues from the Available Users list to the Selected Users list using the arrow buttons. Select and move any users you would like to see in the report.

After making your selections, enter a value in the "**Minimum Percentage to appear on the report**" field. This number indicates the percentage of records that you want to include in the report.

If you choose the **Select Top X Values** radio button, enter the value of "X" in the field. This number is based on the users that are used most often.

Click the **OK** button.

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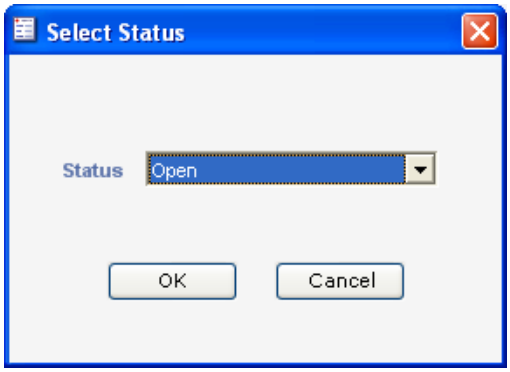
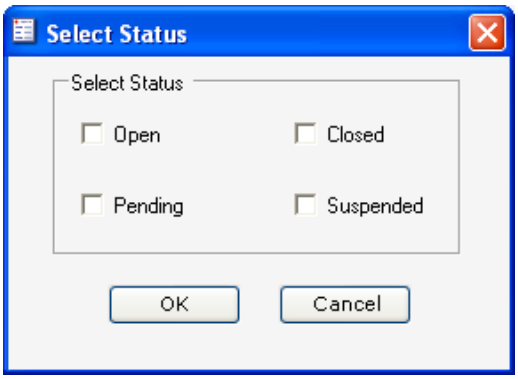
Select Status Window

Reports used in:

- Graph - Issues by Category and Status (prior to the Category Selection window)
- Graph - Issues by Month
- Graph - Issues by Received Days of Week
- Graph - Issues by Received Hours and Status
- Graph - Issues by User and Status
- Issues by Received Hour/Status and Priority





This window has only one field; **Status**. From the drop-down, select the status you would like to use in the report and click the **OK** button. You may be prompted for more information in another window after the Select Status window depending on the report you are running.

Notice that there are two versions of the Select Status window. If you are running the Graph - Issues by Received Hours and Status report, you will be presented with the second version of the Select Status window. This version allows you to select more than one status using the checkboxes, whereas the first version of the Select Status window only allows one selection via the drop-down menu.

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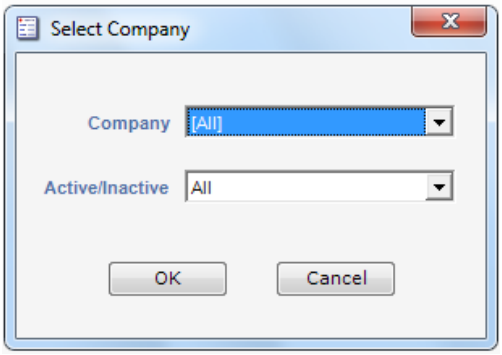
Select Company and Active/Inactive Window

Reports used in:

- Assets by Company
- Graph - Issues by Requester
- Support Contracts



There are only two drop-downs in this window.

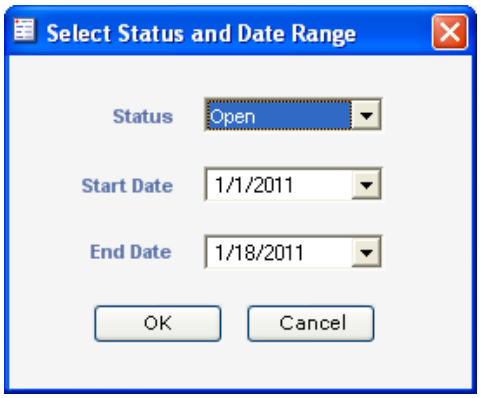
First, select a company (or All companies) from the **Company** drop-down menu.

Next, select Active, Inactive or All from the **Active/Inactive** drop-down menu.

Click the **OK** button.

Select Status and Date Range Window

Report used in: Graph – Issues by Week



First, select the status in the **Status** drop-down menu.

Next, select the start date of the date range in the **Start Date** drop-down calendar.

Then select the end date of the date range in the **End Date** drop-down calendar.

Click the **OK** button.

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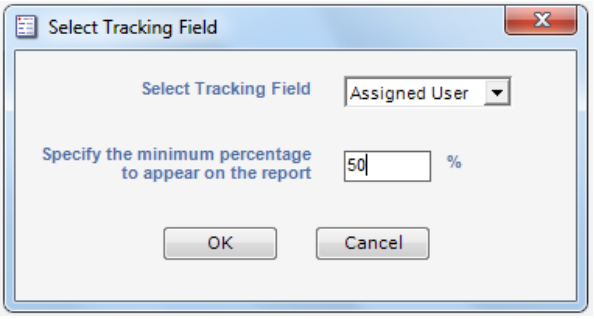
Select Tracking Field and Minimum Percentage Window

Reports used in:

- Graph – Computers by Assignment
- Percentage of Issues



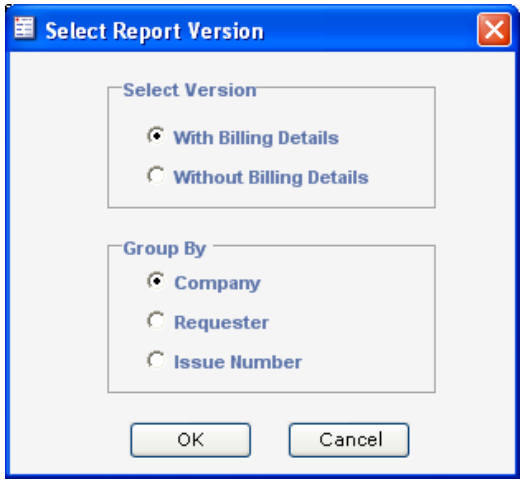
First, select the field you would like to track from the **Select Tracking Field** drop-down menu.

Next, select the minimum percentage of issues with this tracking issue that you would like to appear on the report by entering a number in the "**Specify the minimum percentage to appear on the report**" field.

Click the **OK** button.

Select Report Version Window

Report used in: Billing Summary



First, decide if you want to include billing details in your report and select either the **With Billing Details** radio button or the **Without Billing Details** radio button.

Next, select the item by which you wish to group the report using the **Company**, **Requester** or **Issue Number** radio button.

Click the **OK** button.

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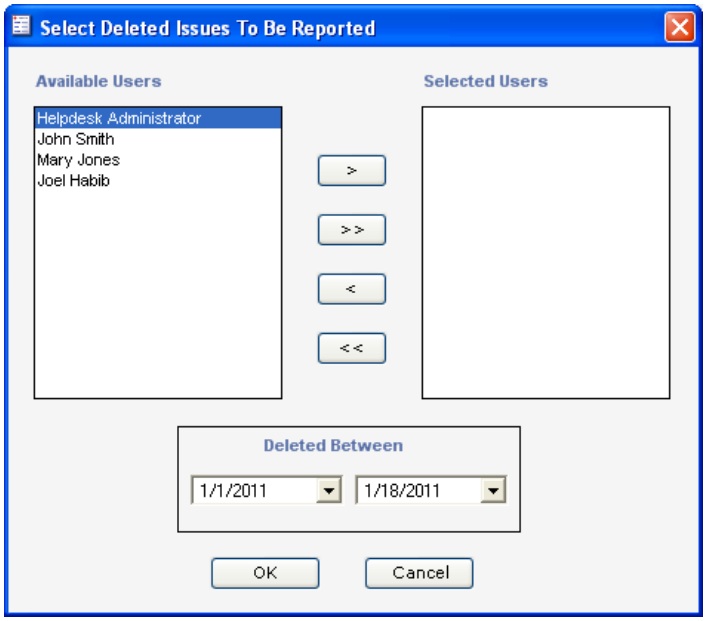
Select Deleted Issues To Be Reported Window

Report used in: Deleted Issues



First, select the available users from the Available Users list and use the arrow buttons to move them to the Selected Users list.

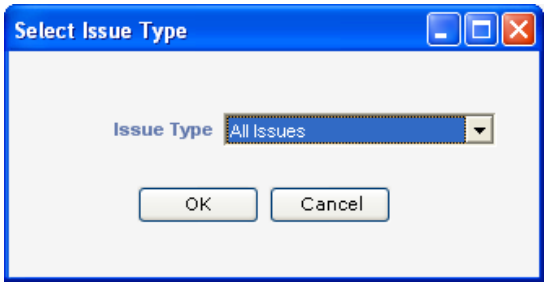
Next, select the start date and end date in the **Deleted Between** date range section.

Click the **OK** button.

Select Issue Type Window

Reports used in:

- Due Dates by Company
- Due Dates by Group



Select the issue type from the **Issue Type** drop-down menu: All Issues or Overdue Issues.

Click the **OK** button.

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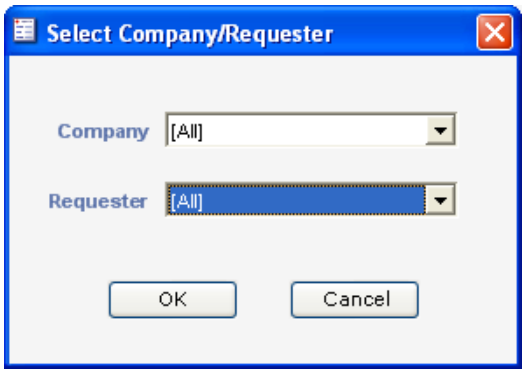
Select Company/Requester Window

Reports used in:

- Assets by Requester
- Company/Requester Listing
- Issue Detail by Company
- Issue Summary by Company
- Products by Company/Requester



First, select the company (or All) from the **Company** drop-down menu.

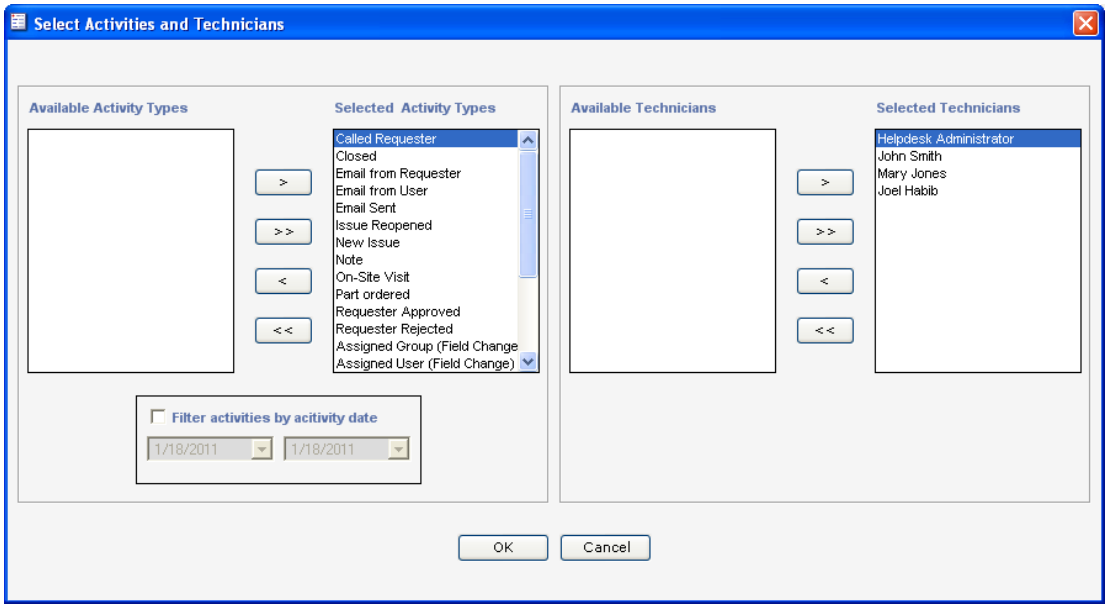
Next, select the requester (or All) from the **Requester** drop-down menu.

Click the **OK** button.

Select Activities and Technicians Window

Reports used in:

- Issue Detail With Activities
- Issue Summary With Activities



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Unlike most selection lists in Help Desk Authority, the lists in this window default with the selections in the Selected lists instead of the Available lists. Most users will want a lot of detail in these two reports, so the default is the maximum. If there are selections that you don't want to include, you can move them to the Available lists.

First, move any unwanted activity types from the Selected list to the Available list using the arrow buttons.

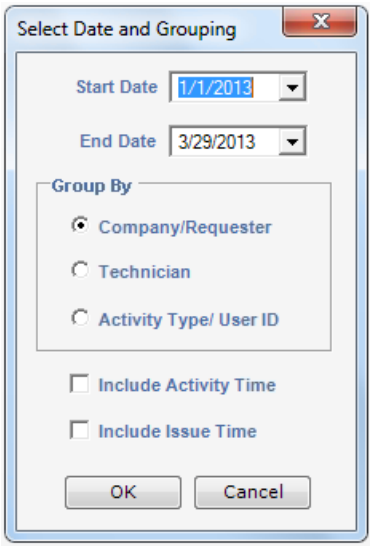
Next, move any unwanted Technicians from the Selected list to the Available list using the arrow buttons.

If you would like to set a date range for your data, mark the **Filter activities by activity date** checkbox. Then select a start date and end date for the date range with the drop-down calendars provided.

Click the **OK** button.

Select Date and Grouping Window

Report used in: Activity Stats By Technician/Requestor/Activity Type



First, select a start date for the date range using the **Start Date** drop-down calendar.

Next, select an end date for the date range using the **End Date** drop-down calendar.

In the Group By section, select grouping by **Company/Requester**, **Technician** or **Activity Type/User ID** by selecting the appropriate radio button.

If you would like to include activity time in the report, check the **Include Activity Time** checkbox.

If you would like to include issue time, check the **Include Issue Time** checkbox.

Click the **OK** button.

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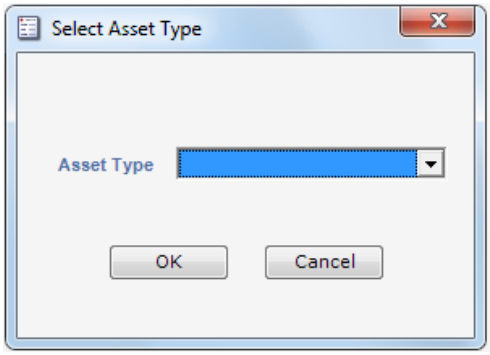
Select Asset Type Window

Report used in: Assets by Type

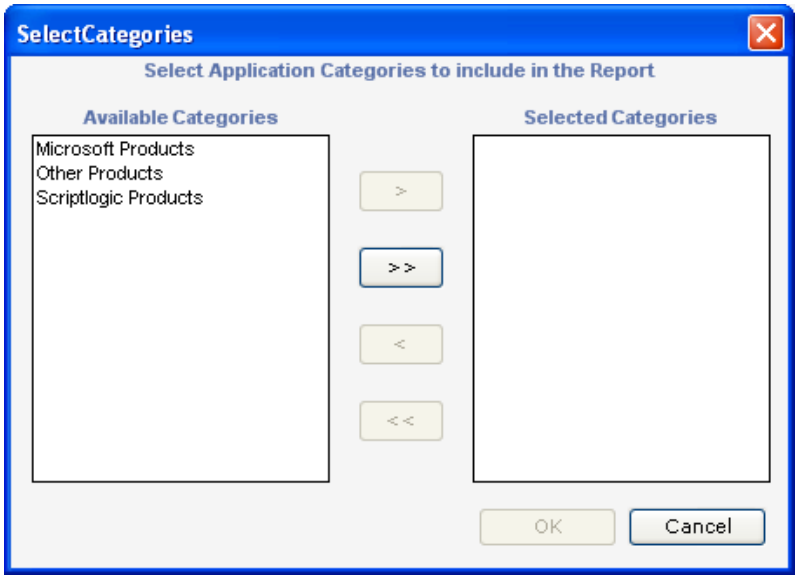


Select the asset type from the **Asset Type** drop-down menu.

Click the **OK** button.

Select Categories Window

Report used in: Application Installation Checklist



Select the application categories you would like to use in the report by moving them from the Available Categories list to the Selected Categories list using the arrow buttons.

Click the **OK** button.

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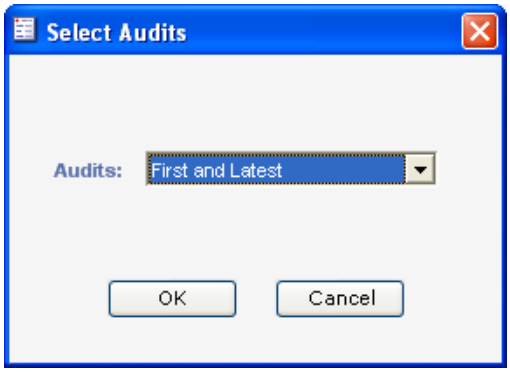
Select Audits Window

Report used in: Change Tracking

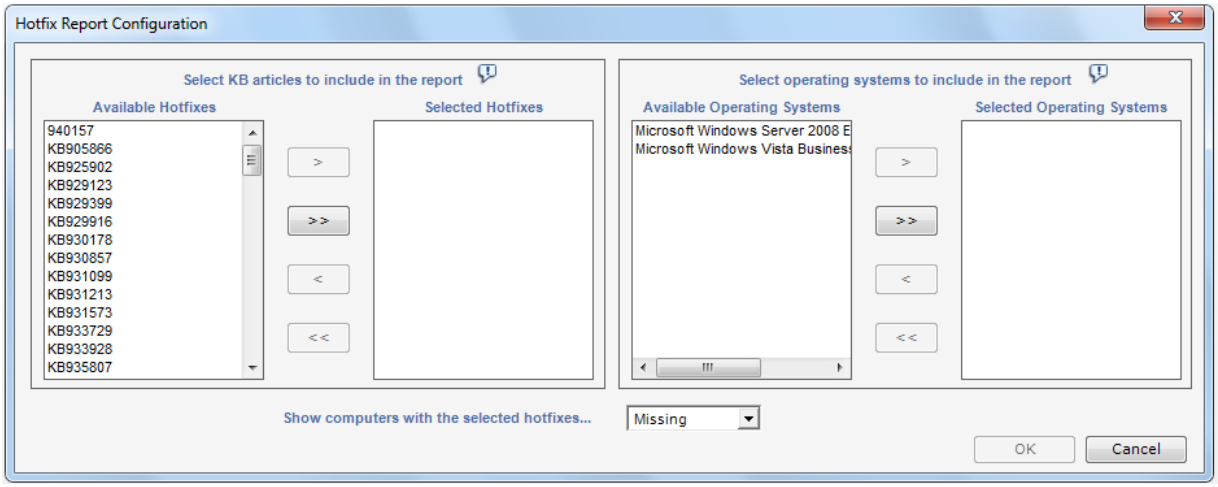


From the **Audits** drop-down menu, select either “First and Latest” or “Most Recent Two.”

Click the **OK** button.

Hotfix Report Configuration Window

Report used in: Hotfixes



First, under the **Select KB articles to include in the report** section, select the Knowledge Base articles to use in the report by moving the available articles from the left pane to the right pane using the arrow buttons.

Next, under the **Select operating systems to include in the report** section, select the operating systems to use in the report by moving them from the left pane to the right pane using the arrow buttons.

In the **Show computers with the selected hotfixes** drop-down menu, choose either Missing, Installed or (Both).

Click the **OK** button.

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Select Date Range Window

Reports used in:

- Modified KB articles
- New KB articles

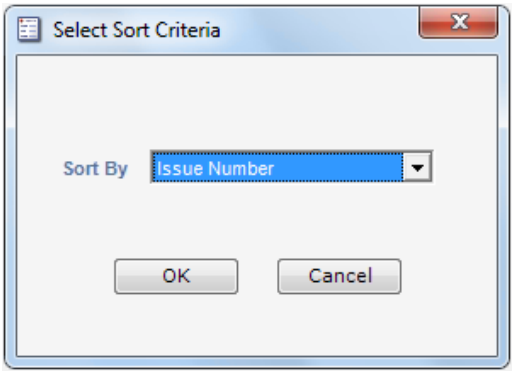
Select the start date for the date range from the **Start Date** drop-down calendar. Then select the end date from the **End Date** drop-down calendar.

Click the **OK** button.

Select Sort Criteria Window

Reports used in:

- Issue Details
- Issue Summary



Select the criteria you would like to sort by from the **Sort by** drop-down menu.

Click the **OK** button.

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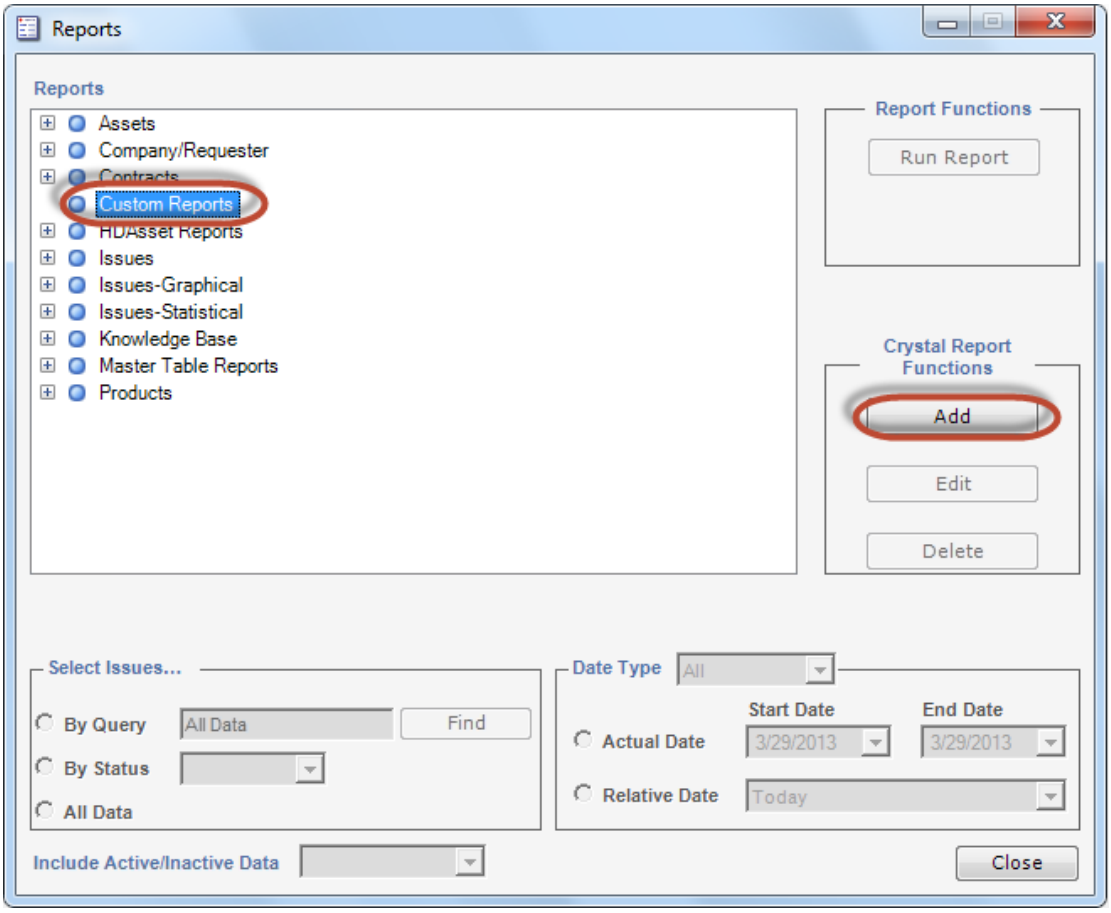
Custom Reports

To accommodate the custom reporting needs of our users, Help Desk Authority allows access to customer reports through the report writing software, Crystal Reports. Your organization can design custom reports that pull data from the Help Desk Authority database tables. The custom reports can be designed to your exact specifications and run within the Help Desk Authority interface. However, the Help Desk Authority filtering features (query, status and date filters) are not available for use with reports that are custom designed with Crystal Reports.

The custom reports in Help Desk Authority will only work with Crystal Reports version 10.5 or higher. If you are using an older version of Crystal Reports, the custom reports you have created will not work with Help Desk Authority.

The custom reports can be accessed by selecting Custom Reports on the report tree as shown below.



The **Add** button is used to add additional reports to the Custom Reports category. You do not need to select the Custom Reports category in order to use the **Add** button since all custom reports will be automatically inserted into the Custom Reports category.

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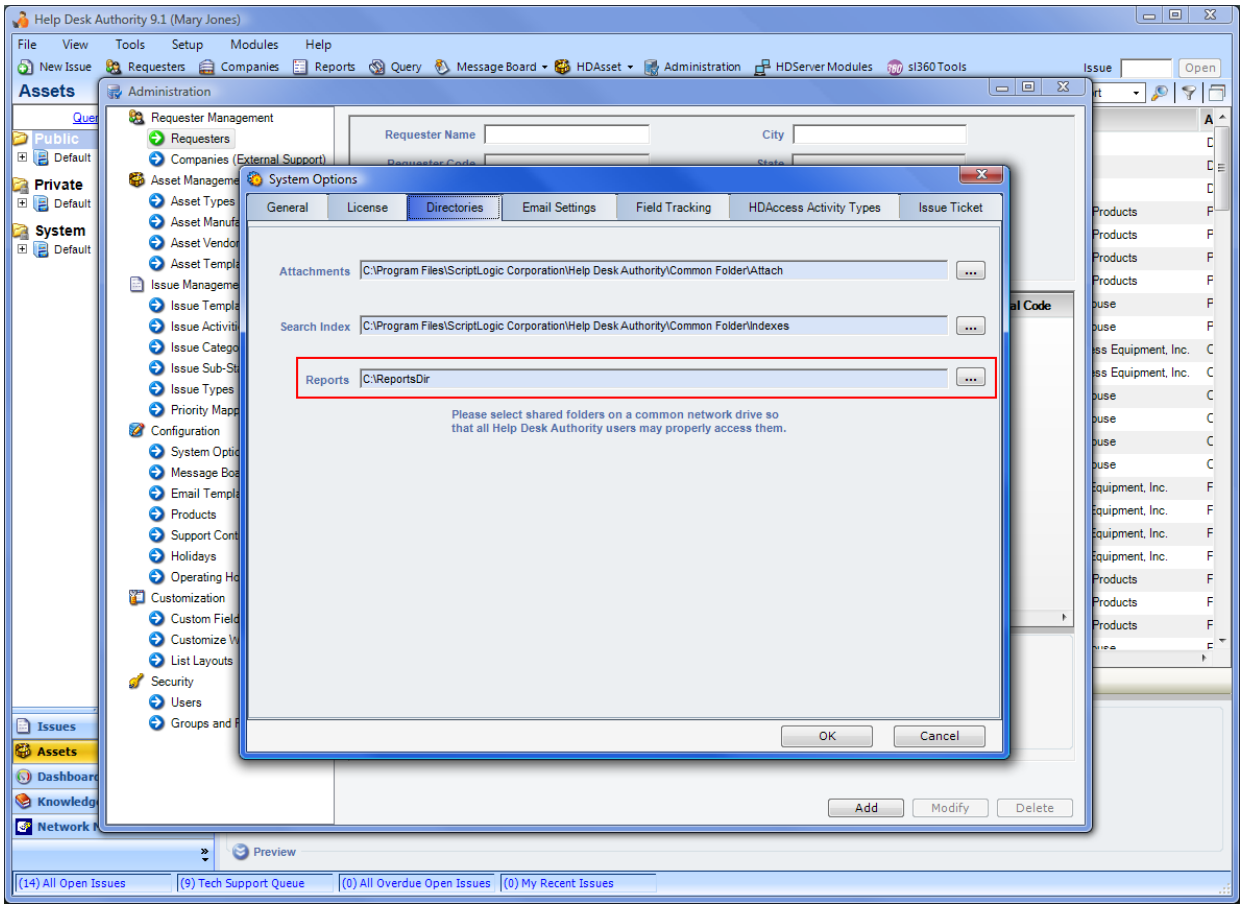
Configuring the Reports Directory

Although this topic has been covered earlier in this manual, it is important enough to repeat.

You must specify a Reports directory in the System Options of Help Desk Authority. All reports, including the custom reports, will reside in the directory you specify. Select the Administration window, then **System Options** under the Configuration heading as shown below.



Adding a Custom Report

To add a custom report to the list of reports:

1. Click the **Add** button in the Crystal Report functions section of the Reports window.
2. Browse to the location of the report you wish to add. The report can be located anywhere. A copy of this report will be moved to the folder you specified when you configured the Reports folder.
3. Select the report you wish to add and click the **Open** button. This will open the Add Report window shown below.

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4. Enter a description for the custom report in the **Description** field. This description will appear in the Custom Reports list.
5. Click the **OK** button. The custom report will now appear in the list under Custom Reports.

To edit (rename) a custom report:

1. Select the custom report you would like to edit.
2. Click the **Edit** button. This will open the Edit Report window.
3. Edit the description in the **Description** field.
4. Click the **OK** button.

To delete a custom report:

1. Select the custom report you wish to delete.
2. Click the **Delete** button.
3. Click the **Yes** button when prompted. The custom report will no longer appear in the Custom Reports list. Note that this does not actually delete the report. It will still remain in the folder you configured to hold reports.

To run a custom report:

1. Select the custom report you would like to run.
2. Click the **Run Report** button. The custom report will run just like any standard report.

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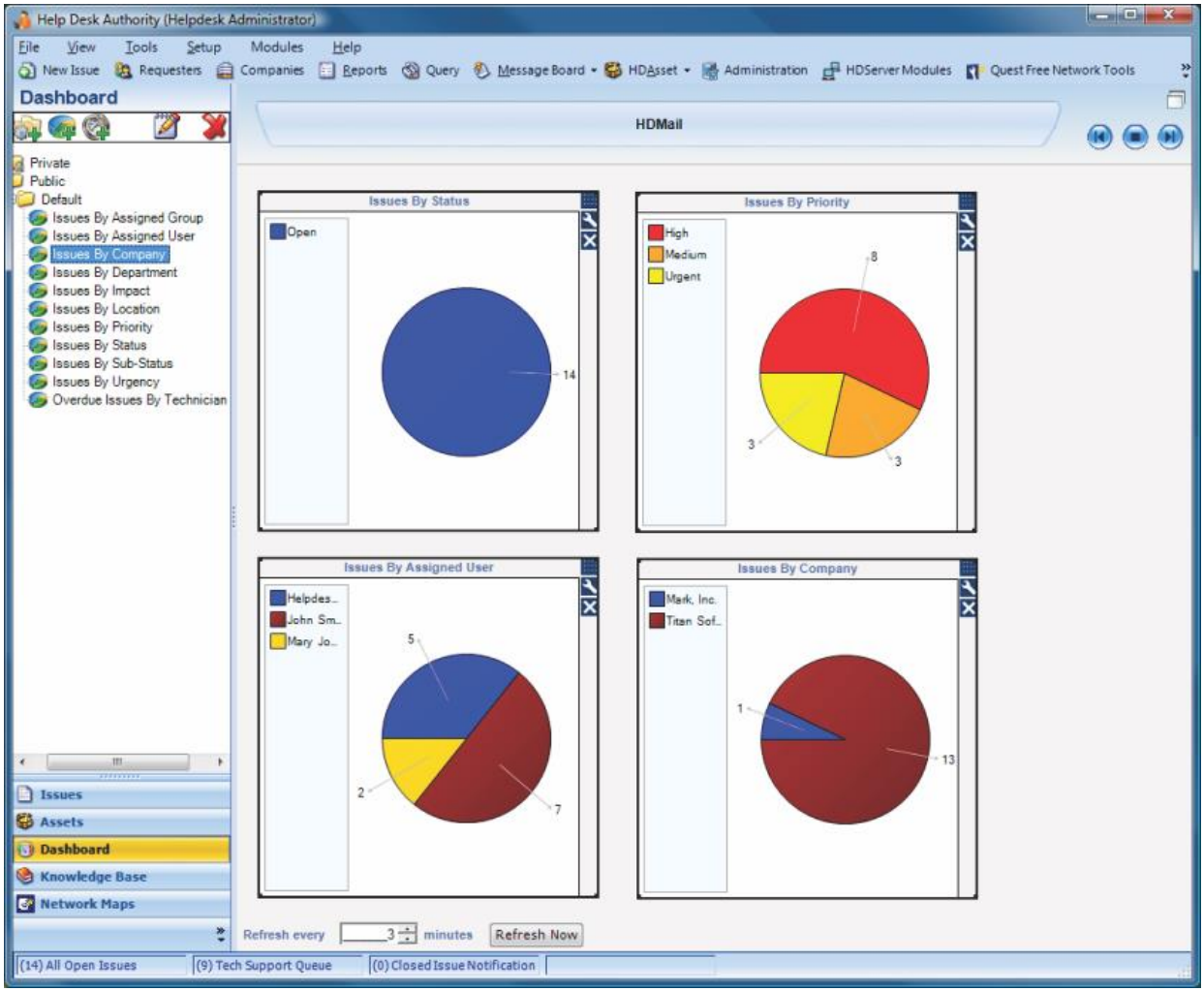
Chapter 8 – The Dashboard

The Help Desk Authority Dashboard provides an integrated visual representation of issue data. The Dashboard is comprised of graphical widgets. Widgets are customizable and can be laid out based on each user's needs.

The top pane of the Dashboard, above the widgets, is the Message board (covered later in this chapter).



The data in your widgets will automatically refresh in real-time depending upon the interval you set manually. At the bottom of the Dashboard is the Refresh information as shown below.

In this example, the Dashboard date in your widgets is scheduled to refresh every 30 minutes. To change the number of minutes, use the numeric up-down field or simply type in any number between 1 and 999.

You can force a refresh of the Dashboard at any time by clicking the **Refresh Now** button.

To view the issue data from any widget, click the widget anywhere in the window.

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Widgets and Widget Categories

The widgets are Graph and Query widgets, meaning they present data in only one dimension, or they present data from a specific query. These widgets are created on the Widget Collections window. Widgets can be categorized as Public or Private. Public widgets can be used by all users, and Private widgets can only be used by the user who creates it.

Creating Widget Categories

In the navigation pane of the Dashboard is a categorical list of widgets. The two main folders are Private and Public. Under each folder, widget categories can be created. Widgets can then be created and stored in each category.

In the sample below, the category “Help Desk Authority Group Issues” is listed under the Public folder, and there are four widgets in this category. Each widget is represented by an icon that varies depending on the type of widget selected. The in the sample below, there are two pie chart widgets and two column chart widgets.

To create a widget category:

1. Select the main category, Public or Private.
2. Click the icon to open the Widget Category window.
3. Enter the name of the new widget category in the Name field.
4. Click the OK button.
5. To edit the name of the category, select the category and click the icon. This will open the Widget Category window. Edit the name in the Name field and click the **OK** button when finished.
6. To delete a widget category, select the category and click the icon. When prompted, click the **Yes** button and the category will be deleted.

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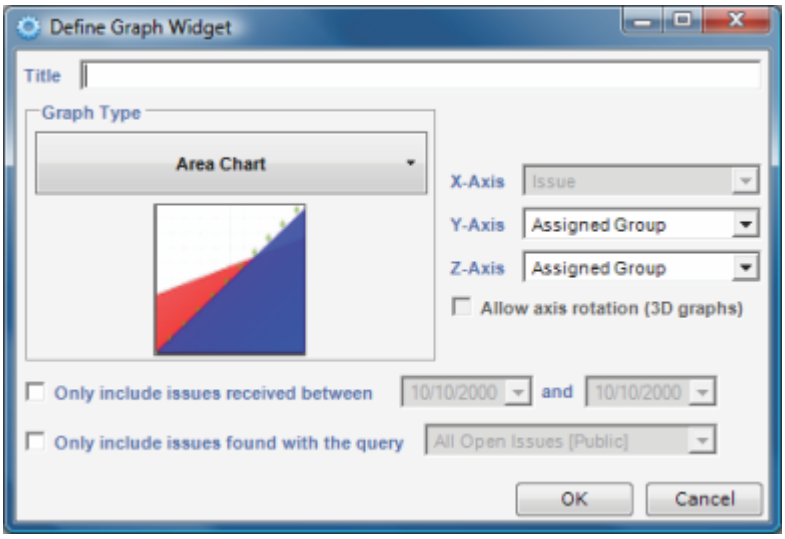
Creating a Widget

1. Select the category for the new widget.
2. Click the icon if you would like to create a new graph widget, or click the icon to create a new gauge widget. This will open either the Define Graph Widget window or the Define Gauge Widget window, both described below.

The Define Graph Widget Window



3. Enter the title you would like to use for the new widget in the **Title** field.
4. In the **Graph Type** section, use the drop-down menu to select one of the 31 possible graph types available for your widget.
5. Select the values you would like to use in the **X Axis**, **Y Axis** and **Z Axis** drop-down menus.
6. In 3-dimensional (3D) graphs, you have the option of Axis rotation for each axis in the graph. This allows you to manipulate the graph at any time to change the view of the data. To enable this feature, check the **Allow Axis rotation (3D Graphs)** checkbox.
7. If you would like to set a date range for the results presented in your graph, check the **Only include Issues received between** checkbox, then select the start date and end date for the range by using the drop-down calendars.
8. If you would like to refine the results of the graph by query, check the **Only include Issues found with the Query** checkbox, then select the query from the drop-down menu.
9. Click the **OK** button when finished.

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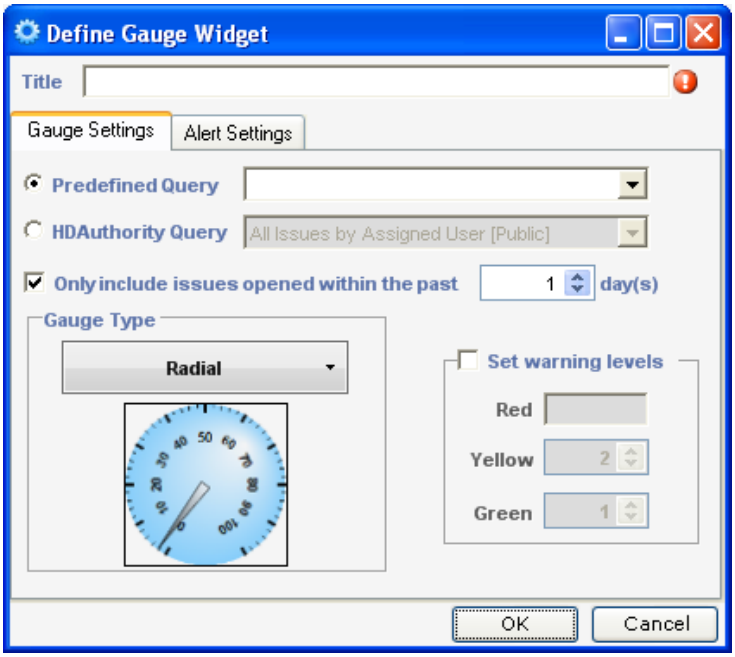
The Define Gauge Widget Window

There are two tabs in the Define Gauge widget window. The first, Gauge Settings, is shown below.



1. Enter the title you would like to use for the new widget in the **Title** field.
2. Using the radio buttons, select between **Predefined query** and **HDAuthority query**, then select the preferred Query for your results from the drop-down menu.
3. To narrow your results by recent date, check the **Only include Issues opened within the past** checkbox, then select the number of days in the **days** numeric up-down field.
4. In the **Gauge Type** section, use the large drop-down menu to select one of the 7 possible gauge types available for your widget.
5. In the Set warning levels section, check the **Set warning levels** checkbox if you would like to set colored warning levels at certain intervals on your gauge. If you choose this option, continue with setting the three warning levels, **Green**, **Yellow** and **Red** (with numeric intervals of your choosing. Use the numeric up-down fields after each level. Note that Green is always the lowest level. Yellow will not be able to be set to a value less than the value defined in the **Green** field.

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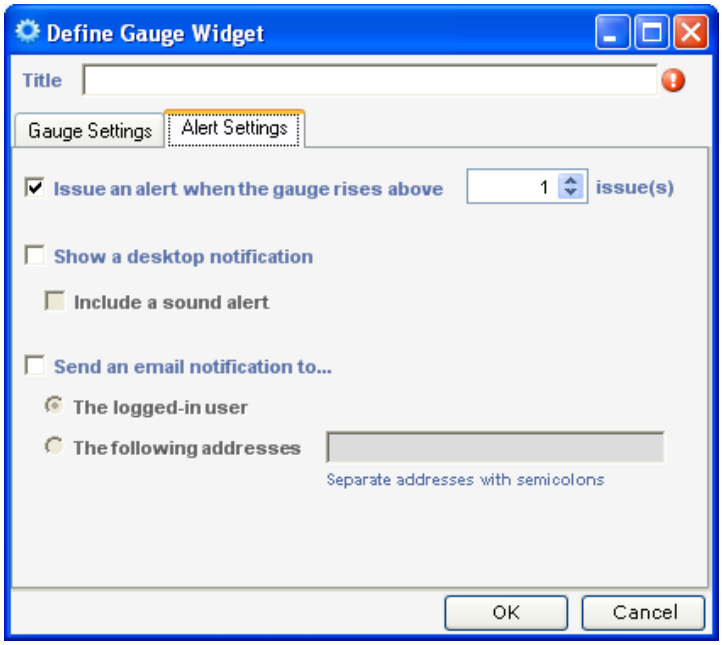
6. Click the Alert Settings tab (shown below):



7. If you would like specific alerts to trigger on different values in the widget, check the checkbox labeled **Issue an alert when the gauge rises above**, then enter a value in the **Issue(s)** numeric up-down field that will trigger the alerts.

Note that you must check this first checkbox to create an alert. If this box is unchecked, all other options will be unavailable.
Also, if you do elect to be presented with alert notifications, you must select either **Show a desktop notification** or **Send an email notification to…**, or both.

8. If you would like a desktop notification, check the **Show a desktop notification** checkbox. If you would like a sound alert to go with the desktop notification, check the **Include a sound alert** checkbox.
9. If you would like an email notification, check the **Send an email notification to…** checkbox. Then select either **The logged-in user** or **The following addresses** radio button. If you select **The following addresses** radio button, enter the email address(es) in the field provided, separating multiple email addresses with a semicolon.
10. Click the **OK** button.

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Editing a Widget

To edit a widget, do one of the following:

Select the widget you would like to edit from the tree-view and click the icon. This will open the widget definition window. Make your edits and click the **OK** button.

OR

Double-click the widget in the tree-view. This will open the widget definition window. Make your edits and click the **OK** button.

OR

Right-click the widget in the tree-view and select Edit This Widget. This will open the widget definition window. Make your edits and click the **OK** button.

OR

From the widget, click the icon. This will open the widget definition window. Make your edits and click the **OK** button.

Deleting a Widget

To delete a widget, do one of the following:

Select the widget you would like to delete from the tree-view and click the icon. This will delete the widget.

OR

Right-click the widget in the tree-view and select Delete This Widget. This will delete the widget.

OR

From the widget, click the icon. This will delete the widget from the Dashboard but not from the tree-view. The widget is still available to add to the Dashboard when needed.

Re-Sizing and Arranging Widgets

The Dashboard comes with the ability to customize the views and layout of your selected widgets. You can re-size widgets, re-arrange them, and place them anywhere you like.

To align all of your widgets to the invisible grid in the Dashboard, right-click in any white space of the Dashboard. You will see the pop-up menu below:

Select **Align to Grid**. Your widgets will now be aligned to the grid, spaced evenly, regardless of the sizes of each widget.

To copy the Dashboard to your clipboard (for example, to make a screen shot), select **Copy Entire Dashboard**.

To print the Dashboard, select **Print Entire Dashboard**.

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To re-size a widget:

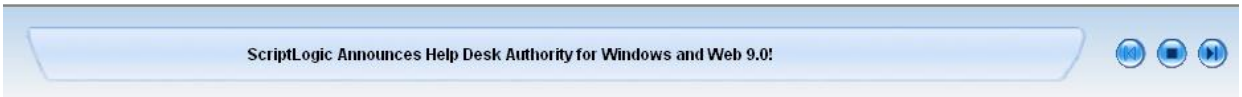
Select any side or corner of the widget and hold down the left mouse button. Drag the side or corner of the widget until it is the side you would like.

To move a widget:

Left-click anywhere in the title bar of the widget, or on the icon and drag the widget to any location on the Dashboard. Note that you can place a widget partially or completely on top of another widget if you would like.

The Message Board

The top pane of the Dashboard contains the Help Desk Authority Message Board. You can edit the Message Board to display any important messages that all Help Desk Authority users and HDAccess customers should see. A good example would be a bulletin to notify users of a scheduled system downtime. Multiple Headlines can be displayed, and the display sequence can also be controlled. A sample message is shown below.



The buttons to the left of the Message board can be used to stop or start the automatic scrolling of the Message Board messages (center button), or to view the previous message (left button) or the next message (right button) in the sequence.

For details on the configuration and management of the Message board, see *The Message Board* under *Configuration* in *Chapter 3 – Administration*.

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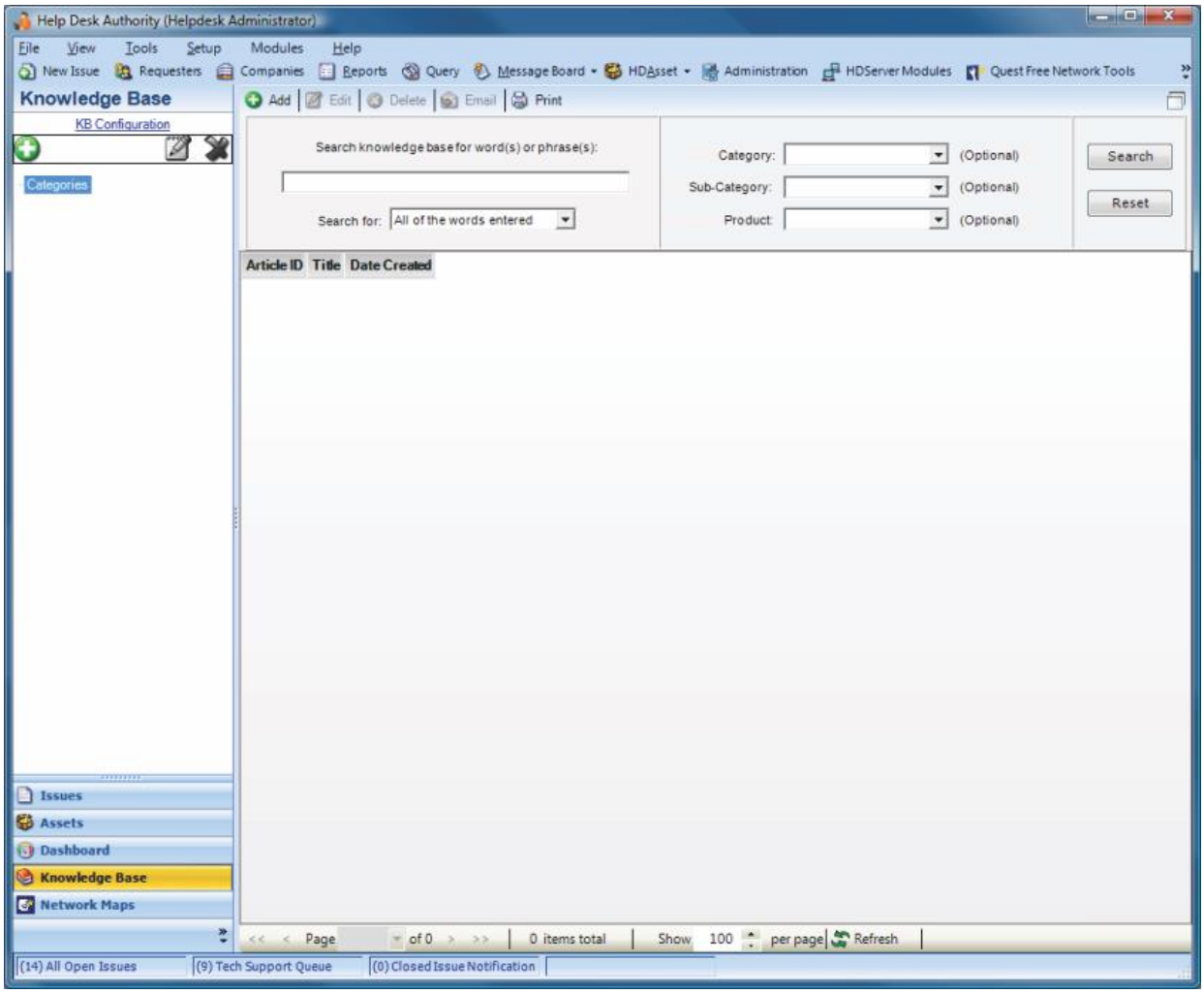
Chapter 9 – The Knowledge Base

Help Desk Authority's Knowledge Base feature facilitates trouble-shooting and problem solving capabilities by storing issues that you choose in an organized reference library. The information is automatically extracted from the issue and written to the Knowledge Base. You can also create your own items to store in the Knowledge Base.

The Help Desk Authority Knowledge Base is comprised of Knowledge Base articles. Knowledge Base articles can be accessed via other Help Desk Authority products, such as HDAccess, unless they are designated for internal use only. If an article is designated for internal use only, it will only be accessible by Help Desk Authority users.



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Searching the Knowledge Base

The section above the Knowledge Base article List is the search engine.

There are several options you can use when searching the Knowledge Base. You can search on a word or phrase by entering that word of phrase into the textbox provided. In the **Search for:** drop-down menu, select either “All of the words entered”, “Any of the words entered”, or “Exact Phrase”.

You also have the option to search on an article **Category**, **Sub-Category** or **Product** by using the dropdown menus for each.

To search the Knowledge Base:

1. Enter the search criteria of your choice in the fields and drop-down menus provided.
2. Click the **Search** button.
3. To clear all search fields, click the **Reset** button.
4. To see the entire population of Knowledge Base articles, do not enter anything in the search fields. Simply click the **Search** button.

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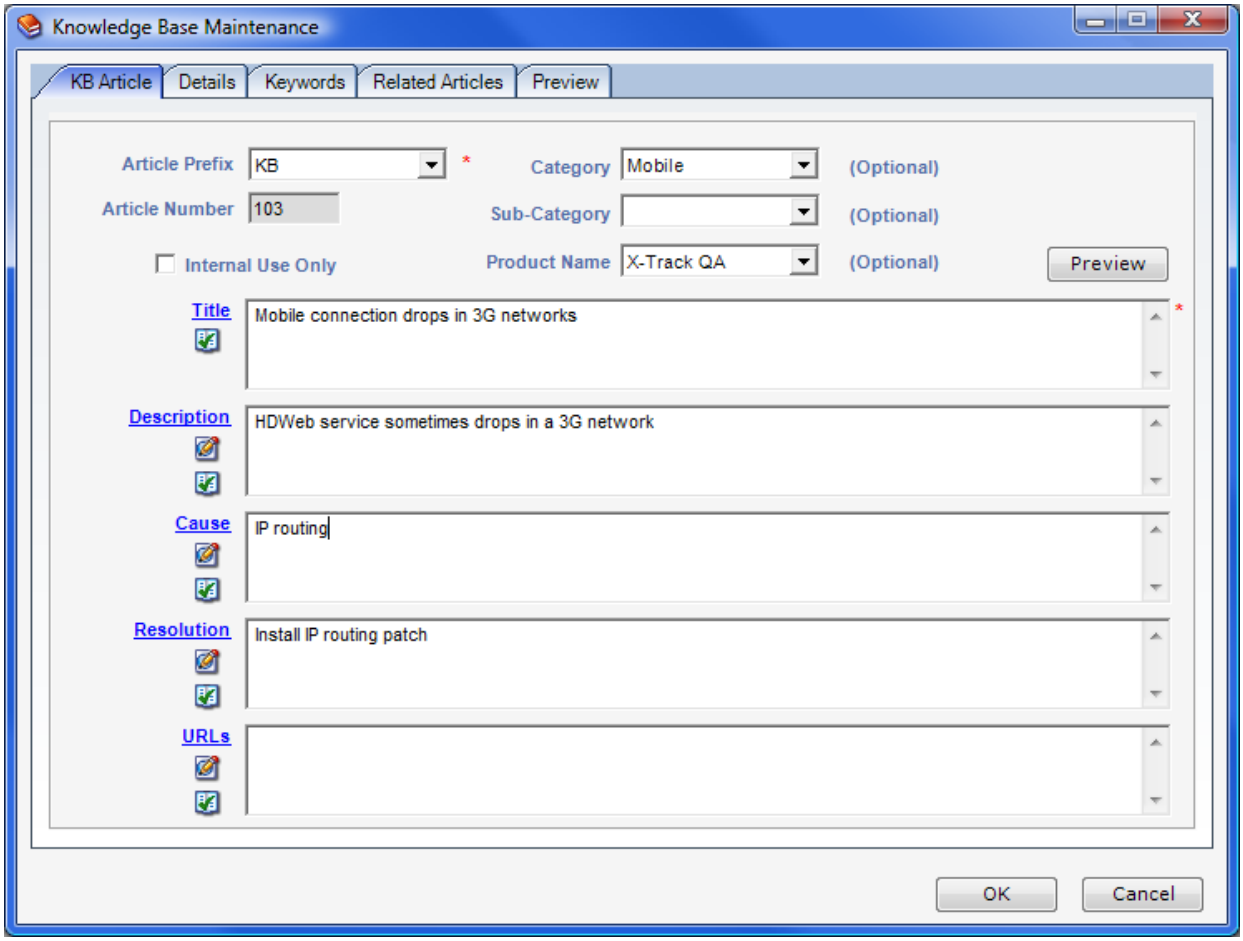
Reading a Knowledge Base Article

When you locate the article or list of articles you are searching for, double-click anywhere in the listing row of the article to open the article. You can also single-click the article ID. The article will open as shown below.



The KB Article Tab

There are five tabs in a Knowledge Base article. This first tab, shown above, is the KB article tab.

The **Article Prefix** drop-down is populated with pre-defined prefix choices that are compiled in KB Configuration (described later in this chapter). This prefix is paired with the **Article Number** below it. The **Article Number** field is automatically populated when the article is created.

The **Category** and **Sub Category** drop-downs are also user-defined (see later in this chapter). They are optional fields, but they will usually be completed.

Another optional field is the **Product Name**. If the correct selection is available in the drop-down, it is recommended that you use it.

If the **Internal Use Only** checkbox has been checked, the article is limited to internal technicians only.

If you click the **Preview** button, the Preview tab will open to give you a visual of the article in HTML. This is how it will look online when your customers view them through HDAccess.

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The next five fields will be automatically populated if the article has been created from an issue, and if the issue contains the information. You can also enter text or HTML into these fields. If you are using HDAccess, and you would like to grant your customers the ability to view Knowledge Base articles online, HTML provides a more user-friendly view.

Also, clicking on the field name will open a much larger text area in a new window. Some users find this environment easier to work with when reading Knowledge Base articles.

The **Title** field will show the title of the article.

The **Description** field will contain a detailed description of the issue or problem.

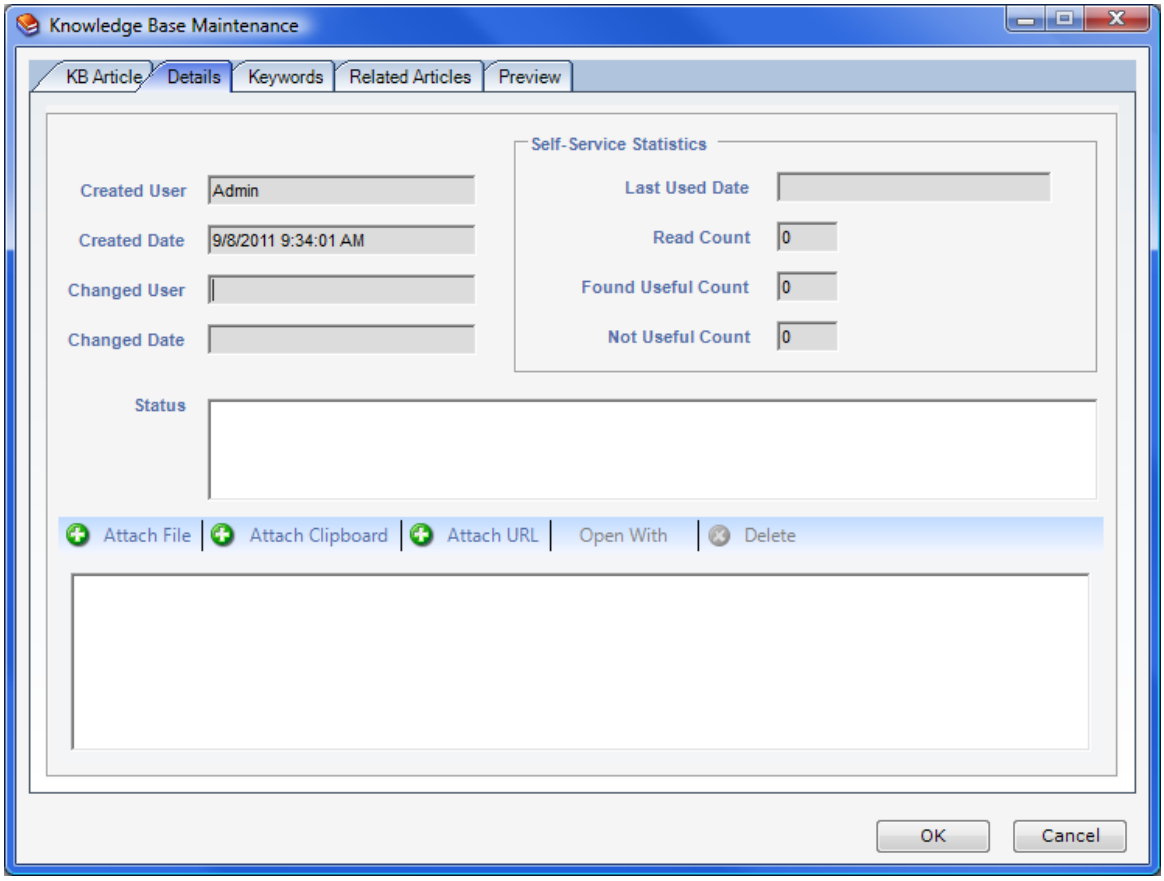
The **Cause** field will show a list of factors that caused the problem.

The **Resolution** field will list the steps taken to resolve the problem.

The **URLs** field will contain any URLs with relevant information to the issue.

The Details Tab

The Details tab contains more detailed information regarding the article.



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The top eight fields on this tab are automatically populated.

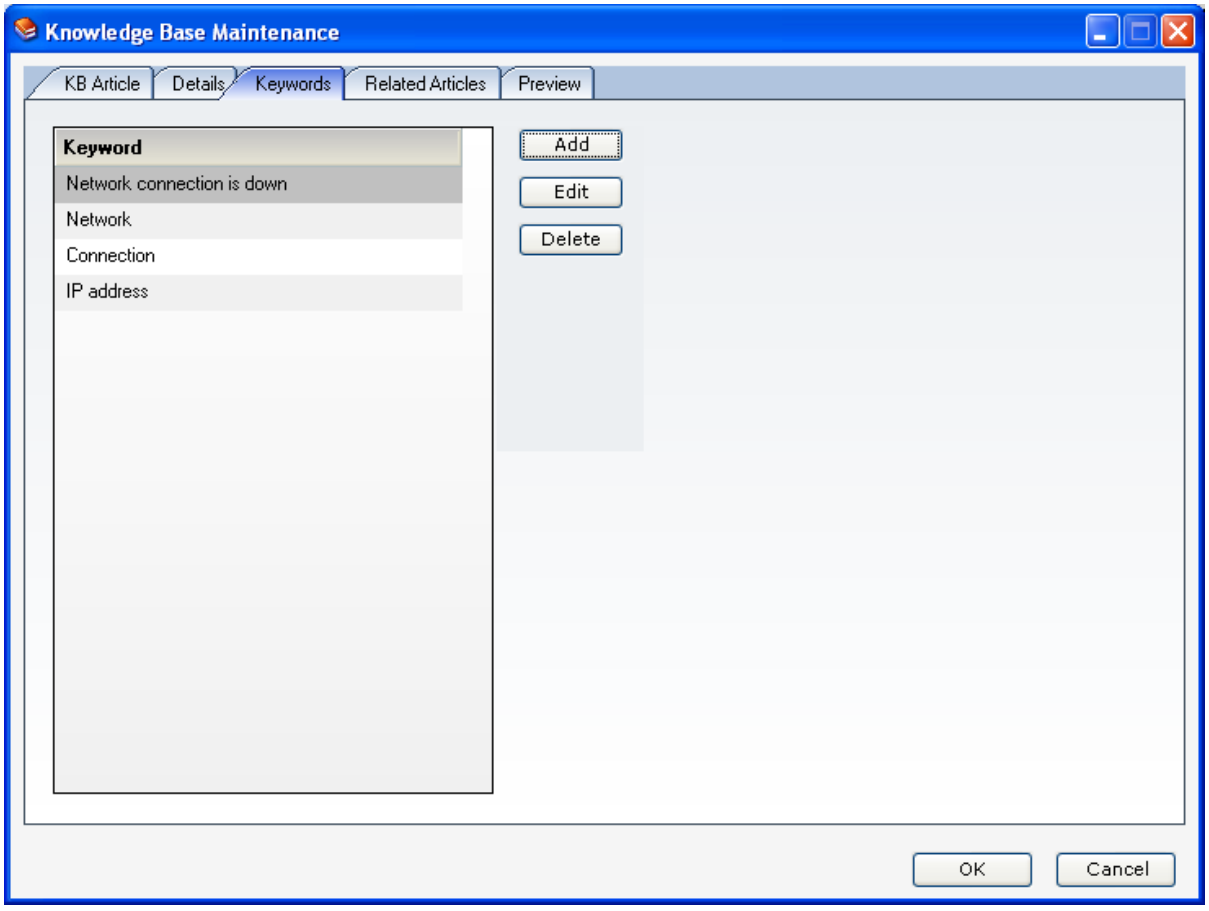
- **Created User** is the user who created the article.
- **Created Date** is the date the article was created.
- **Changed User** is the user who last updated the article.
- **Changed Date** is the date and time of the last change to the article.
- **Last Used Date** is the date that the article was last viewed.
- **Read Count** is the number of times the article has been viewed.
- **Found Useful Count** is the number of times a reader noted the article as useful.
- **Not Useful Count** is the number of times a reader noted the article as not useful.

Below these eight fields is the **Status** field. This contains any information regarding the status of the issue described in the article.

The bottom section of the tab is used for attachments. To view these attachments, select the attachment and click the **Open With** button, then select the appropriate application.

The Keywords Tab

The keywords connected to the article are used for searching. When a user types a word or phrase into the search box, Help Desk Authority scans the keywords of articles to find matches.



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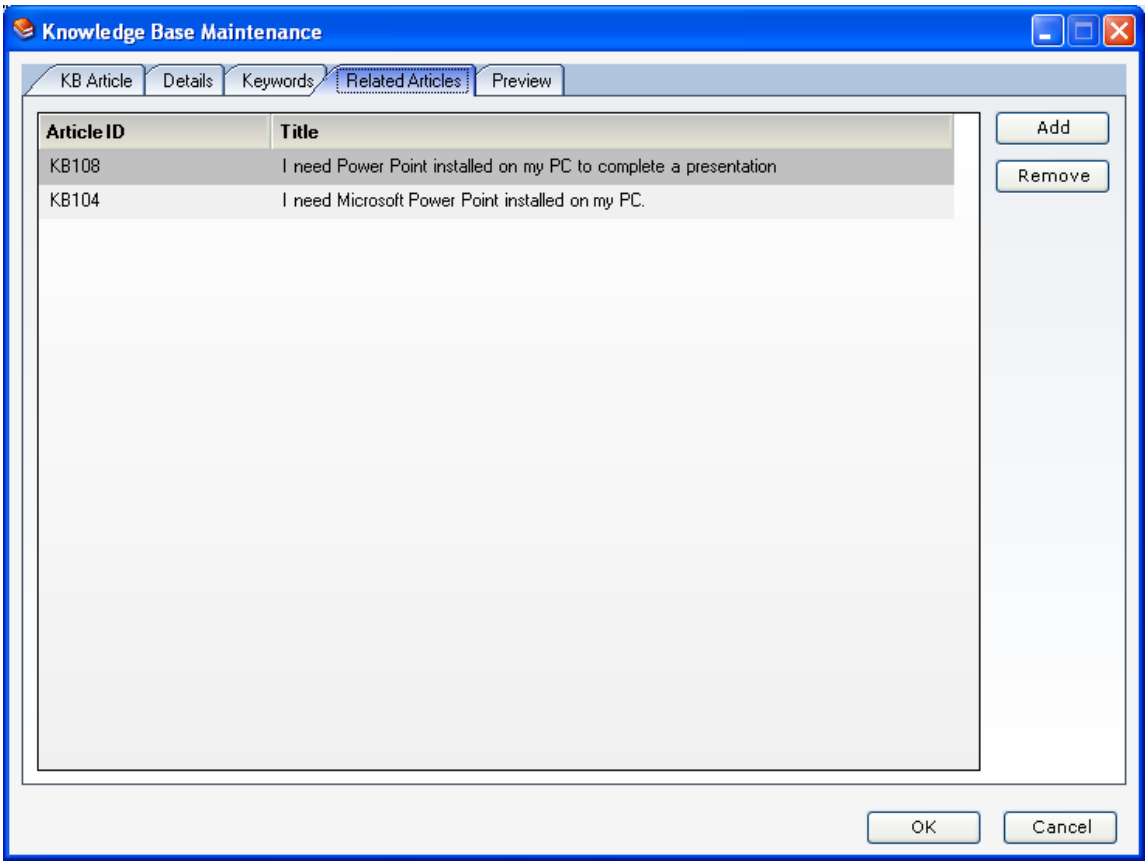
The Related Articles Tab

Often, a Knowledge Base article will have articles that are similar or are related to the same issue. By relating these articles, searching the Knowledge Base for an answer to a problem will be easier.

In the article below, with the Related Articles list shown, there are two related articles. When you see related articles like this, you can select them (from the Preview tab) and read more on the related issue.



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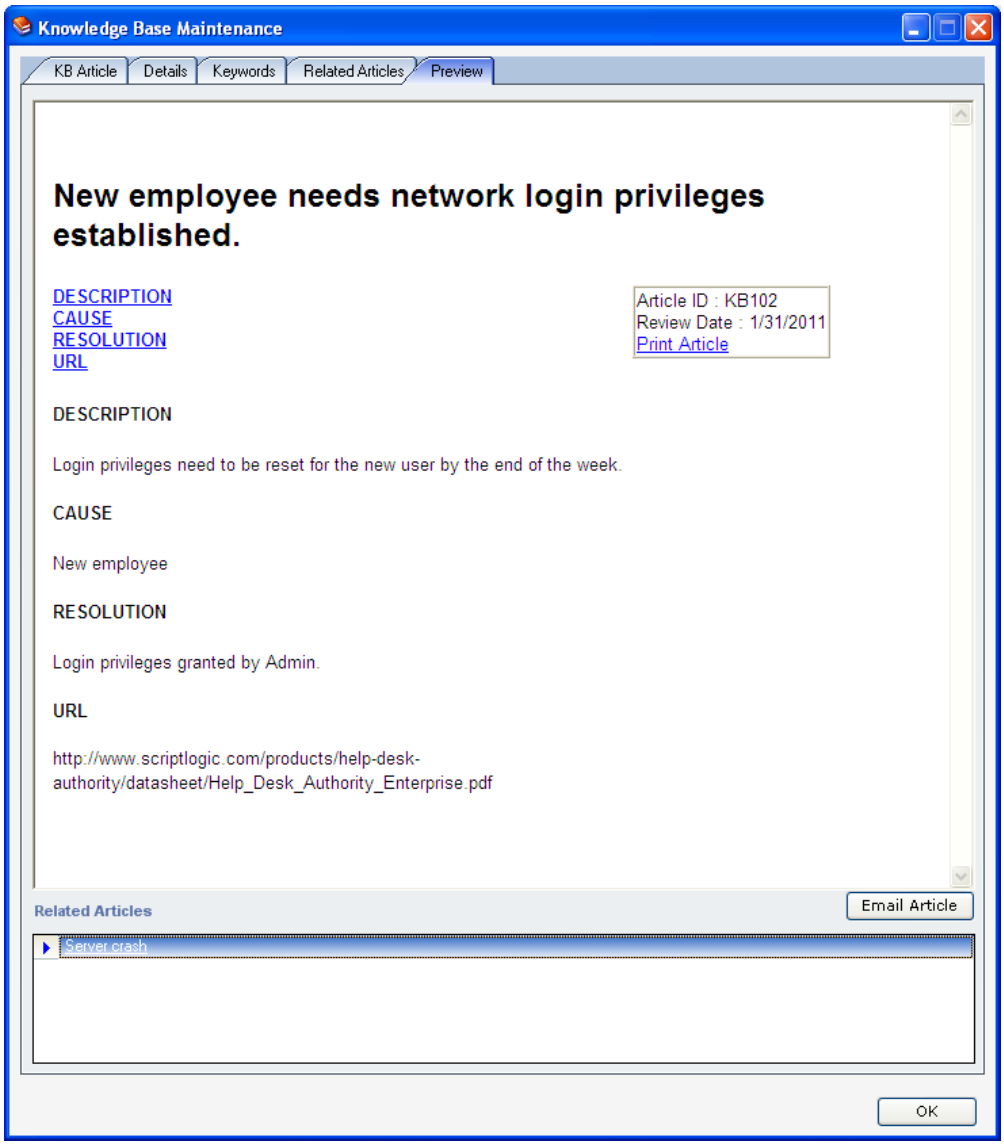
The Preview Tab

The Preview tab displays the Knowledge Base article in HTML format, just as it would appear in HDAccess. From the Preview tab, you can print the article by clicking the **Print Article** link. You can also email the article by clicking the **Email Article** button.

Near the bottom of the Preview tab is the Related Articles section. If there are related articles listed, you can select one to view by clicking on the name of the article.



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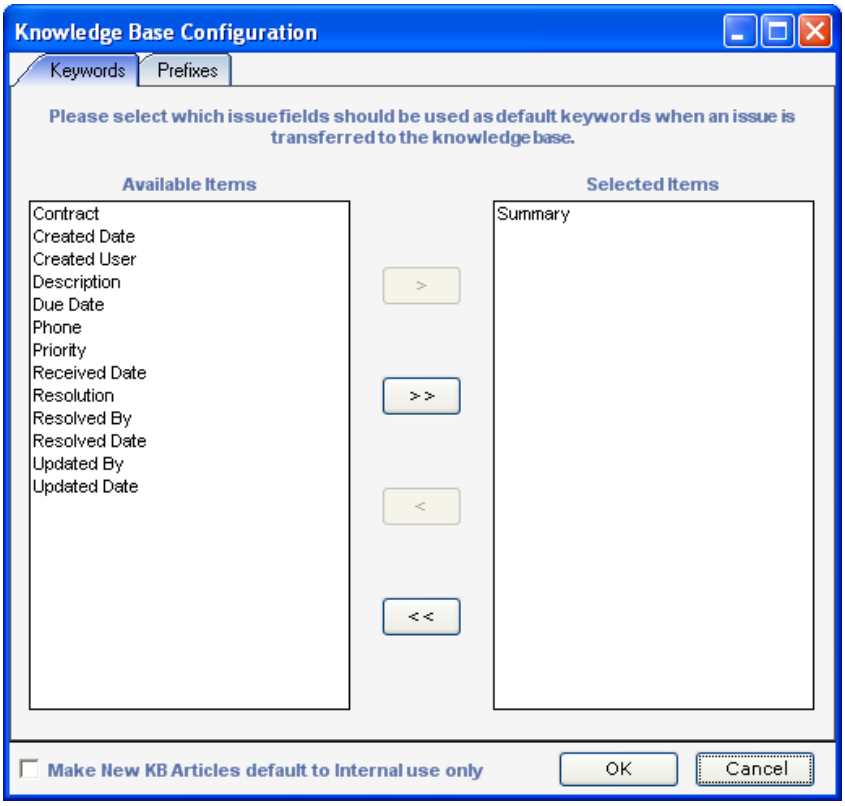
Knowledge Base Configuration

The Knowledge Base can be configured with several options that will make it a more effective tool for your business.

To configure the Knowledge Base, click the “KB Configuration” link located above the Knowledge Base article categories as shown below.

This will open the Knowledge Base Configuration Window.



There are two tabs in the Knowledge Base Configuration window:

- Keywords – Select the issue fields to be searched for keywords.
- Prefixes – Set the list of prefixes for article names.

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The Keywords Tab

As shown in the screen shot above, the Keywords tab provides a selection list allowing you to select the individual issue fields whose values will be scanned by keyword searches.

For example, if you chose the Priority field to add to list, and you turn an issue into a Knowledge Base article and that issue has a Priority of “High”, the work “High” will automatically appear in the Keyword list for that article.

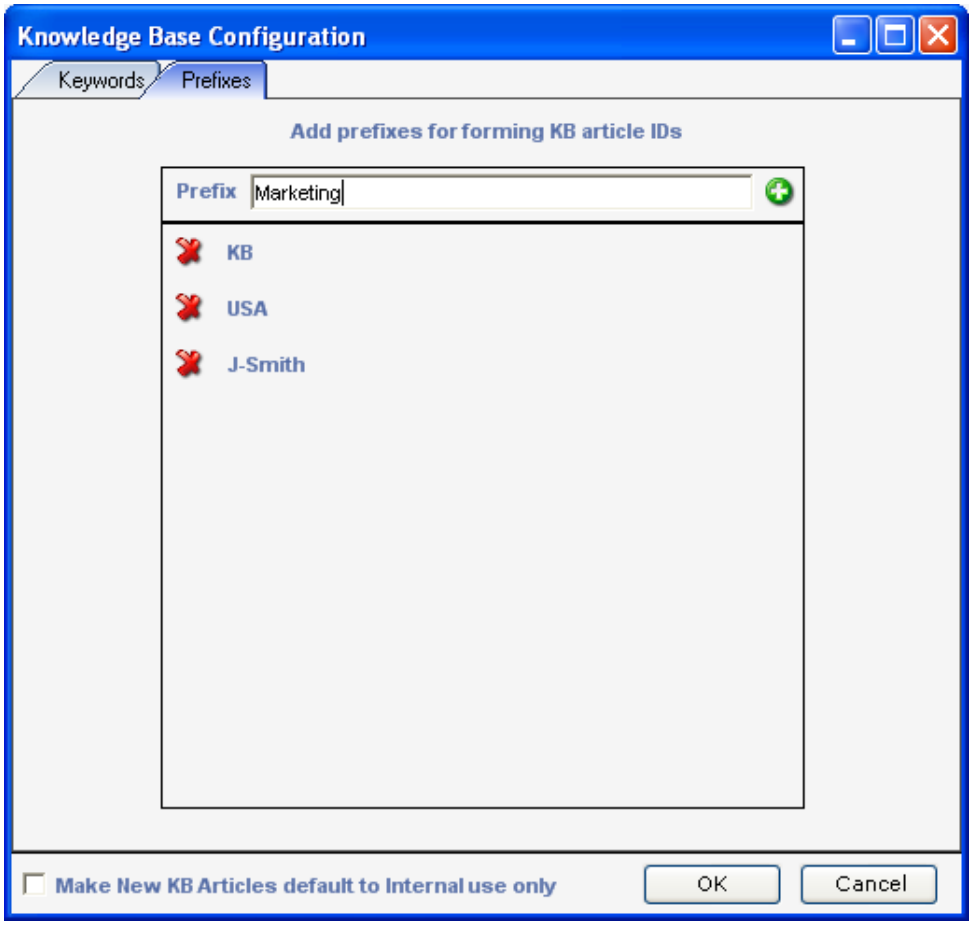
Move fields of your choice from the Available Items list to the Selected Items list by using the arrow buttons. Use the double-arrow button to move all fields. Any field can be moved back and forth at any time.

Check the “**Make new KB Articles default to Internal use only**” checkbox if you would like all new Knowledge Base articles to be visible only in the Help Desk Authority application and not to customers through HDAccess.

The Prefixes Tab

Every Knowledge Base article is assigned a number. But simple numbers can be confusing when keeping track of articles. So Help Desk Authority allows you to select as many prefixes as you like. A prefix can be any combination of character, letter or number, up to 32-characters long.

A prefix can be a user’s full name or just initials, for example. Or a department number or name. It can be anything that will help you organize and identify articles.



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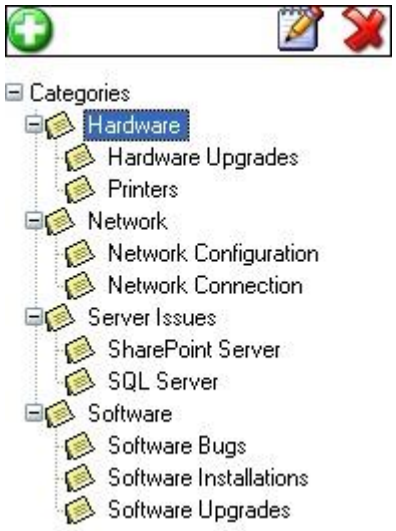
To add a prefix to the list, enter the value you would like to use in the Prefix field, then click the icon. You can store as many prefixes as you like.

To delete a prefix, click the icon next to the prefix.

Knowledge Base Categories

Knowledge Base articles are managed with categories. The categories navigation is located in the navigation pane on the left side of the window as shown below.



Adding a Category

To add a category or a sub-category:

1. Select “Categories” or another main category (in the case of creating a sub-category), then click the button. This will open the Category Value window.
2. Enter the name of the new category.
3. Click the **OK** button. The category will appear in the category list.

Editing a category

To edit a category:

1. Select the category you wish to edit.
2. Click the icon to open the Category Value window.
3. Edit the category name.
4. Click the **OK** button when finished.

Deleting a Category

To delete a category:

1. Select the category you wish to delete.
2. Click the icon.
3. The category will be deleted without a prompt.

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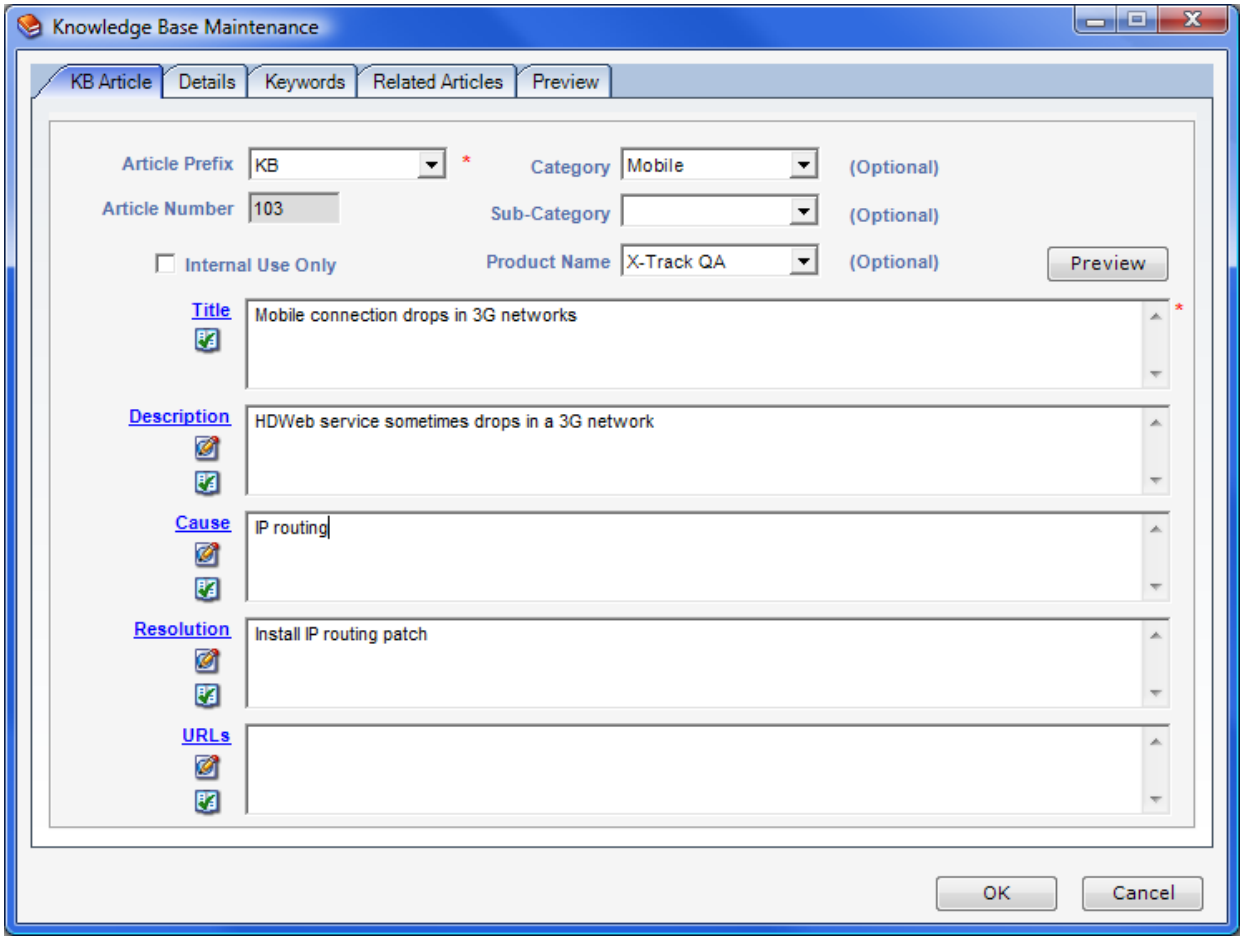
Creating, Editing and Deleting Knowledge Base Articles

There are two ways to create a Knowledge Base article.

The first is from within an issue. If you would like to create a Knowledge Base article from an issue, click the Add to KB icon on the issue window toolbar. This opens the Knowledge Base Maintenance window, with all of the relevant information from the issue already pre-populated into the various fields and tabs in the article.

The second method is by clicking the Add icon in the Knowledge Base toolbar. This also opens the Knowledge Base Maintenance window, but no fields are pre-populated except for the **Article Number** field (as soon as a prefix is selected).

The KB Article Tab



There are five tabs in a Knowledge Base article. This first tab, shown above, is the KB Article tab.

The **Article Prefix** drop-down is populated with pre-defined prefix choices that are compiled in KB Configuration (described later in this chapter). This prefix is paired with the **Article Number** below it. The **Article Number** field is automatically populated when the article is created.

The **Category** and **Sub-Category** drop-downs are also user-defined (see later in this chapter). They are optional fields, but it is highly recommended to use these fields to enable easier searching.

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Another optional field is the **Product Name**. If the correct selection is available in the drop-down, it is recommended that you use it.

If you would like to limit the article to internal technicians only, check the **Internal Use Only** checkbox.

Clicking the **Preview** button will pull up the Preview tab to preview the article in HTML. This is how it would look online in HDAccess.

The next five fields will be automatically populated if the article is being created from an issue, and if the issue contains the information. You can also enter text or HTML into these fields. If you are using HDAccess, and you would like to grant your customers the ability to view Knowledge Base articles online, HTML provides a more user-friendly view. To open a WYSIWYG HTML editor, click the icon under the heading.

Also, clicking on the field name will open a much larger text area in a new window. Some users find this environment easier to work with when writing Knowledge Base articles.

If you would like to spell-check your articles, click the icon.

In the **Title** field, enter the title of the article. This is a required field.

In the **Description** field, enter a detailed description of the issue or problem.

In the **Cause** field, enter the factors that caused the problem.

In the **Resolution** field, enter the steps taken to resolve the problem.

In the **URLs** field, enter any URLs containing relevant information to the issue.

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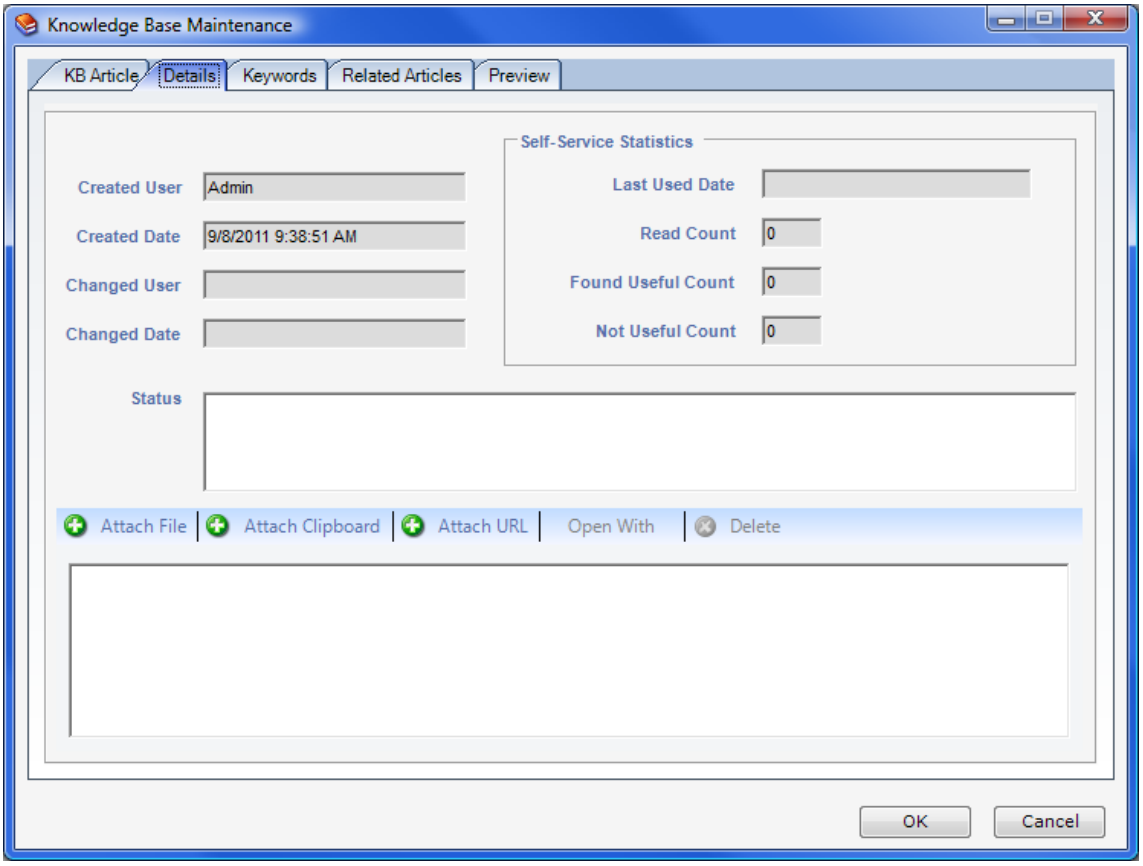
The Details Tab

The Details tab contains more detailed information regarding the article.



The top eight fields on this tab are automatically populated.

- **Created User** is the user who created the article.
- **Created Date** is the date the article was created.
- **Changed User** is the user who last updated the article.
- **Changed Date** is the date and time of the last change to the article.
- **Last Used Date** is the date that the article was last viewed.
- **Read Count** is the number of times the article has been viewed.
- **Found Useful Count** is the number of times a reader noted the article as useful.
- **Not Useful Count** is the number of times a reader noted the article as not useful.

Below these eight fields is the **Status** field. Enter any information regarding the status of the issue described in the article.

The bottom section of the tab is used for attachments. Use the buttons to attach a file, a URL, or the contents of the clipboard.

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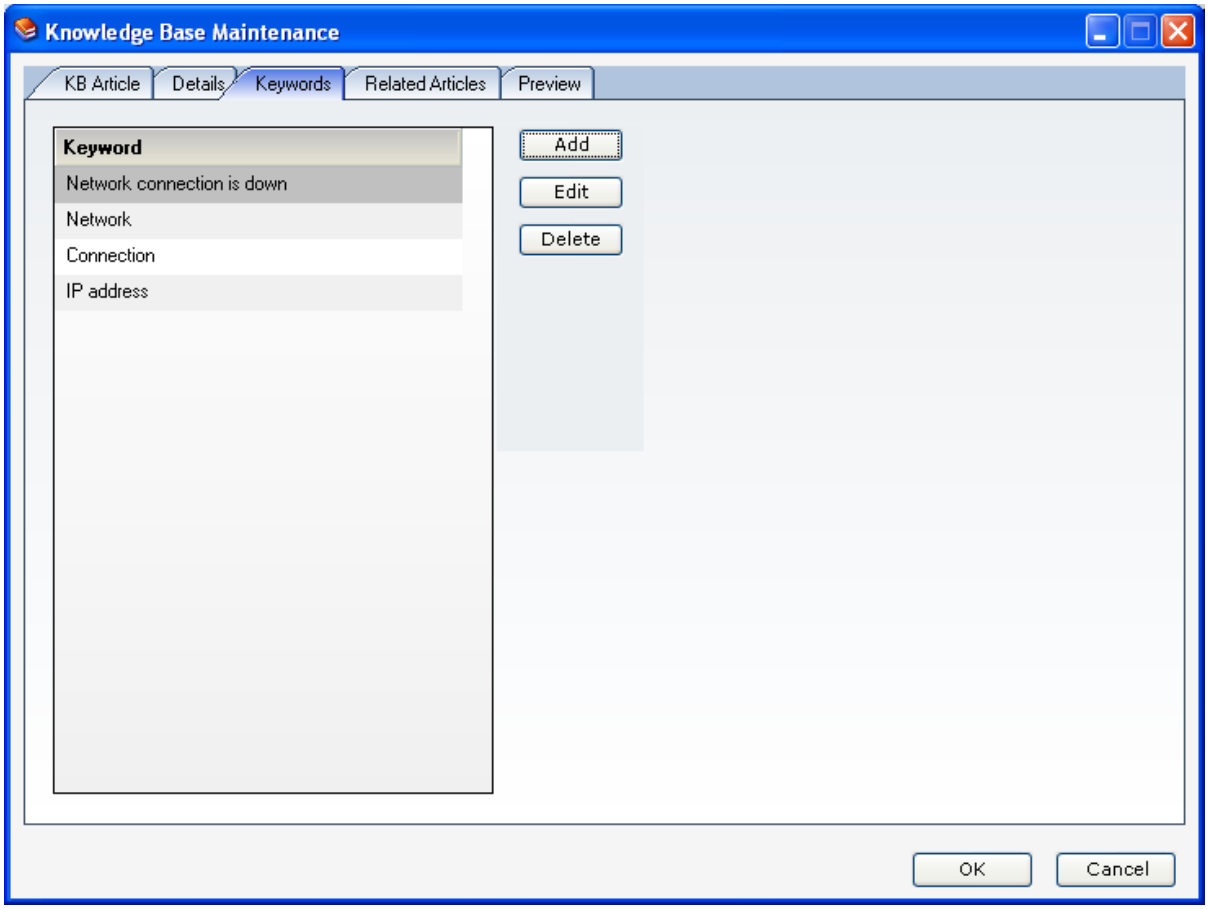
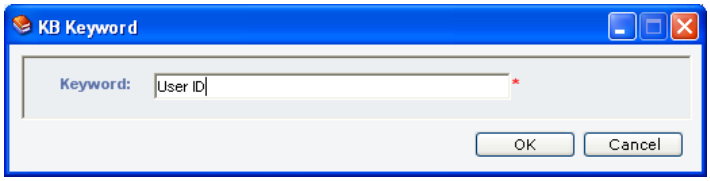
The Keywords Tab

The keywords connected to the article are used for searching. When a user types a word or phrase into the search box, Help Desk Authority scans the keywords of articles to find matches. In the Keywords section, you can add as many keywords or phrases as you like. Make sure they are relevant to the article so you can avoid bad search results.



To add a keyword to the keyword list:

1. Click the **Add** button. This will open the KB Keyword window as shown below.



2. Enter the keyword or phrase in the **Keyword:** field.
3. Click the **OK** button. The keyword or phrase will now be in the Keyword list.
4. To edit the keyword, click the **Edit** button to open the KB Keyword window, make any necessary changes to your keyword or phrase, then click the **OK** button.

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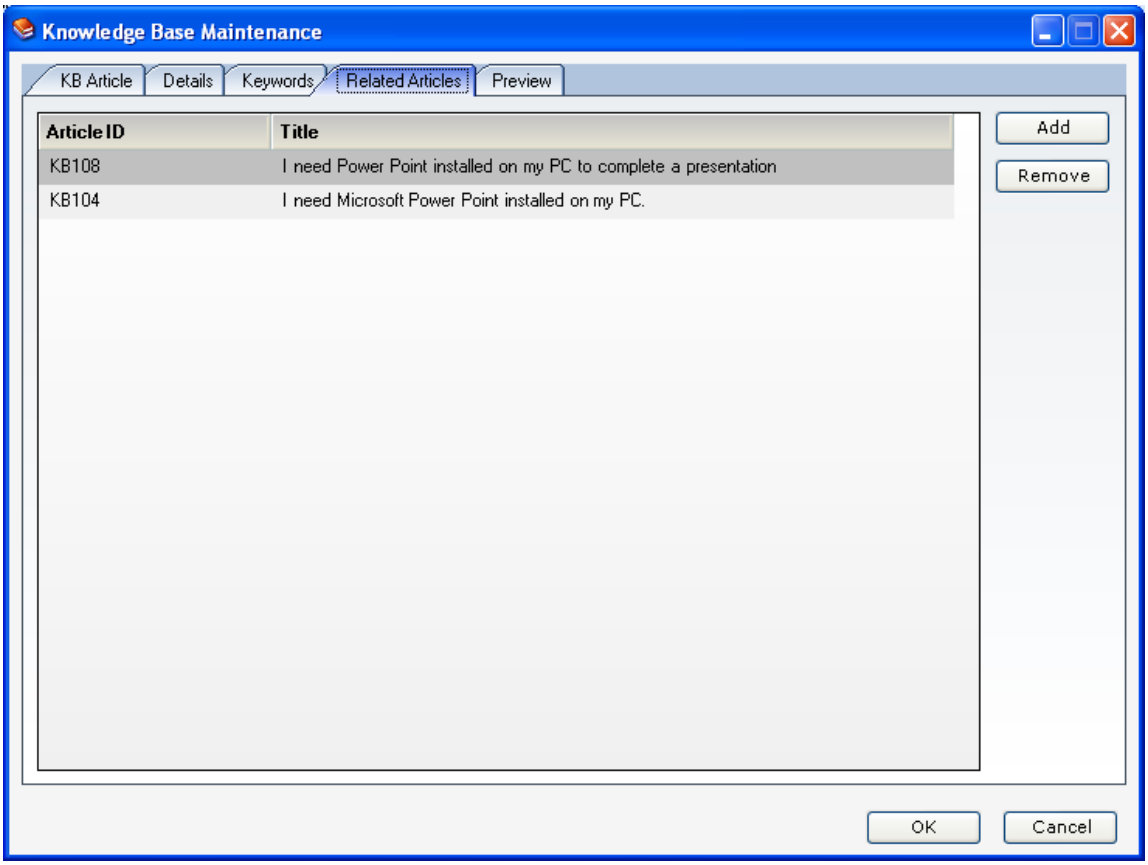
5. To Delete a keyword, select it from the list and click the **Delete** button. When prompted for confirmation, click the **Yes** button..

The Related Articles Tab

Often, a Knowledge Base article will have articles that are similar or are related to the same issue. By relating these articles, searching the Knowledge Base for an answer to a problem will be easier.

In the article below, with the Related Articles list shown, there are two related articles. When you see related articles like this, you can select them (from the Preview tab) and read more on the related issue.



To add a related article to an existing article:

1. In the Related Articles tab, click the **Add** button. This will open the Knowledge Base Search window.
2. Use the search criteria to locate any related articles. Related articles will appear in the Knowledge Base Search Result window list.
3. Select any articles that you would like to relate to the base article and click the **Select** button.
4. The article will now be listed as a related article.

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The Preview Tab

The Preview tab displays the Knowledge Base article in HTML format, just as it would appear in HDAccess. From the Preview tab, you can print the article by clicking the **Print Article** link. You can also email the article by clicking the **Email Article** button.

Near the bottom of the Preview tab is the Related Articles section. If there are related articles listed, you can select one to view by clicking on the name of the article.

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Chapter 10 – HDAsset

HDAsset by Quest is a powerful and innovative IT inventory management and PC auditing software application which is now fully integrated with the Help Desk Authority suite of issue-management support center software. HDAsset collects technical information about an organization's Windows computer systems and stores the results in a central database. Use this data to perform queries, create reports, or see a comprehensive overview of all the systems within an organization. View changes to the hardware, software and system configuration of the computers within an enterprise.

Assets

Help Desk Authority provides an excellent means for keeping an inventory of your organization's assets. In addition to storing information such as serial numbers, locations, and manufacturers, you can also capture key information about the vendors who have sold or who are leasing the assets to you.

It is important to note that each asset must be assigned an asset type. Therefore, you must create at least one asset type. For example, if you choose not to categorize your assets by type, you can create one category called "Asset" and then assign this type to all assets that you create.

The Asset Toolbar

Icon	Result
New Asset	Add new asset. Opens the Asset Types window.
Edit Asset	Edit asset. Opens the Asset – Edit window.
Delete Asset	Delete asset. Deletes the selected asset.
Template	Asset templates. Opens the Asset Templates window.
Print	Print. Prints the asset.

Next to the asset toolbar are two drop-down menus, described below.

The List Layout Menu

This drop-down menu allows you to choose which list layout to use. In the example above, the only available selection is "All Columns.". Select "Refresh Asset List Layouts" to make sure you have a complete list of all current asset list layout options.

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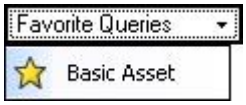
The Favorite Query Menu



This drop-down menu allows you to determine which assets will appear in the asset list.

View Separate Window Icon

The icon will break out the Asset List window into a separate window.

The Asset Filter Pane

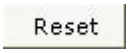
The icon next to the drop-down menus opens the **Asset Filter Pane** button. In the example below, the option has been selected to show the filter. The filter appears immediately above the asset list.

From this view, the current query can be edited to suit your needs. The controls are very similar to the Query window controls.

The button will remove the selected conditions from the query.

The button will add a new condition to the query.

The button will apply the changes you have made to the existing query.

The  button will remove all conditions from the query.

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The Asset List Grid

The asset list grid is the main area of the window when “Assets” is selected in the Navigation Pane. The asset list grid lists all assets matching the criteria of the current asset list layout. You can display as much or as little information in the assets list as you like by customizing asset list layouts in the Administration window as discussed in the previous chapter. The example below shows the default “All Fields”. Notice the horizontal scroll bar at the bottom of the grid. Sliding the scroll bar to the right will reveal much more data than is shown in the current view.

Asset ID	Asset Description	Audited Computer	Asset Part Number	Asset Serial Number	Asset Comments	Asset Date Purchased	Asset Price
1	HP Printer	False				1/15/1921 12:00 AM	0
2	Konica Laser Printer	False					0
3	HP Scanner	False					0
4	Canon Printer - 1st...	False	37313	6367-2437-9697		1/16/1921 2:38 AM	96.99
5	Canon Printer - 2n...	False	99724	4143-8160-6853		1/16/1921 2:38 AM	96.99
6	Canon Printer - 3rd...	False	77248	6017-2425-8428		1/15/1921 6:57 PM	139.99
7	Canon Printer - 4th...	False	72338	7724-2584-2873		1/15/1921 6:57 PM	139.99
8	HP Printer - 1st Flo...	False	24286	5801-0172-4258		1/13/1921 8:24 AM	149.97
9	HP Printer - 2nd Fl...	False	35566	2664-1408-3737		1/13/1921 8:24 AM	149.97
10	HP Desktop Rece...	False	46096	85675-76372		1/13/1921 9:07 AM	571.95

The Refresh Pane

The refresh pane is located between the issue list pane and the preview pane. The refresh pane describes the contents of the issue list pane in overall detail.

- The first section displays the page number you are on and how many pages of results there are. You can jump to any page by using the drop-down menu.
- The third section gives the total number of results from the query.
- The fourth section displays how many results to display per page. You can enter any number from 1 to 999,999 by using the up and down arrow buttons or by entering in a number manually. The refresh icon ( ) next to the per-page count can be used at any time to update the issue list.

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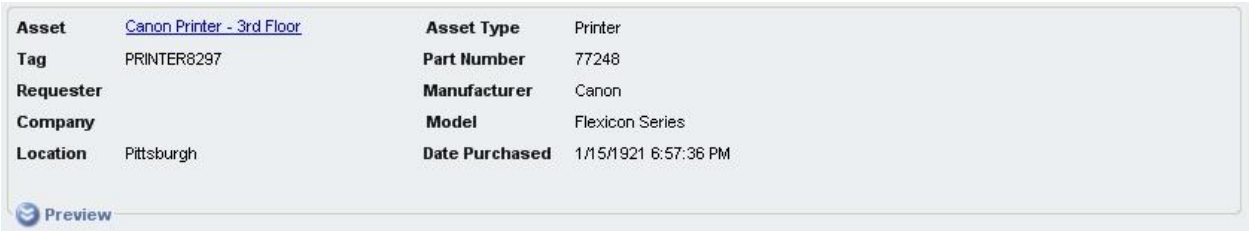
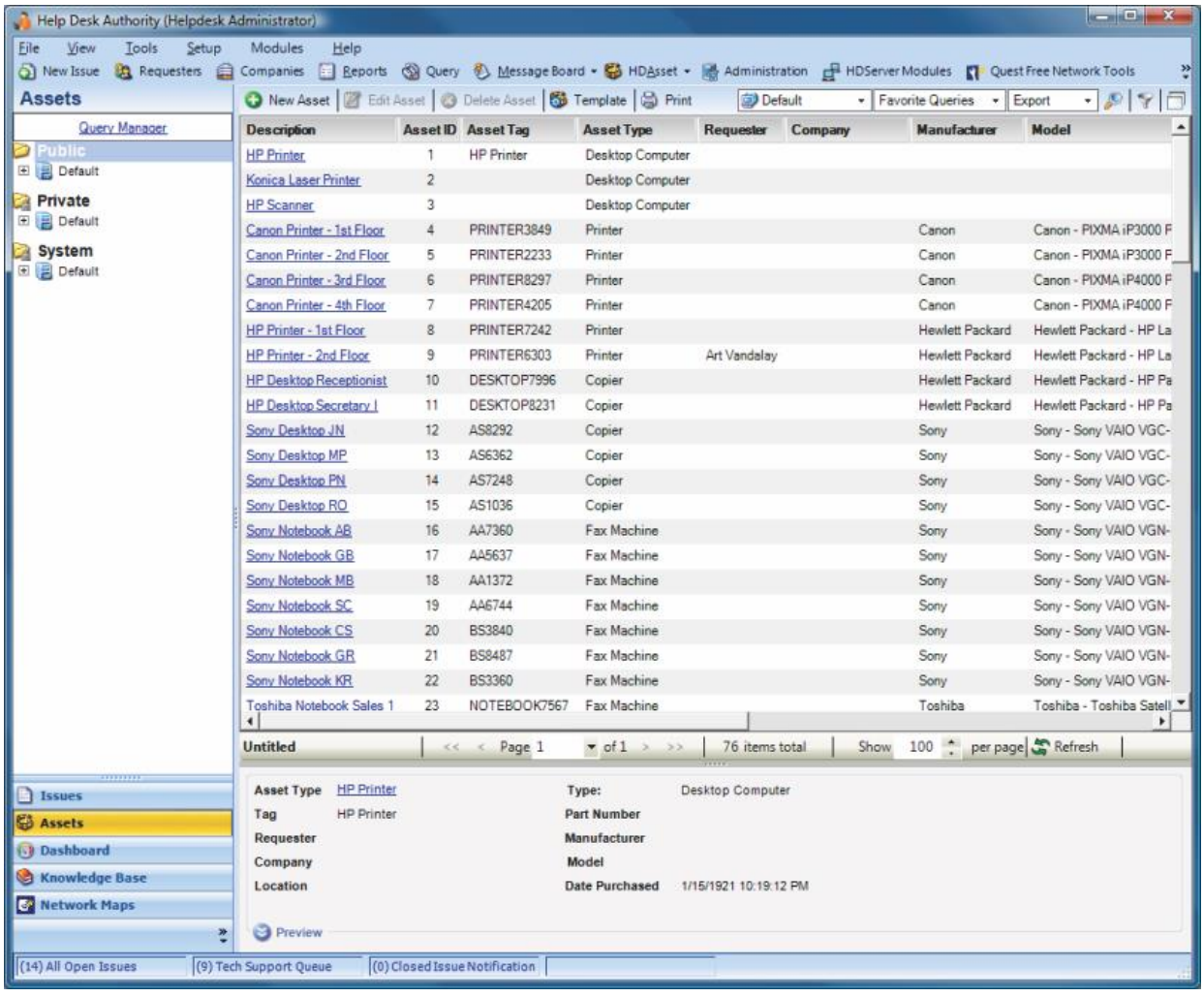
The Preview Pane

The preview pane (shown below) presents the user with a selection of details from the selected asset.



You can toggle the preview pane on and off by clicking the icon at the bottom of the page. Turning off the preview pane will allow you to view more assets in the asset list. Below is an example where the preview pane is hidden. You can un-hide the preview pane by clicking the icon at the bottom of the page.


Help Desk Authority (Helpdesk Administrator)
File View Tools Setup Modules Help
New Issue Requesters Companies Reports Query Message Board HDAsset Administration HDServer Modules Quest Free Network Tools
Assets
New Asset Edit Asset Delete Asset Template Print
Default Favorite Queries Export
Query Manager
Public
Default
Private
Default
System
Default
Description Asset ID Asset Tag Asset Type Requester Company Manufacturer Model
HP Printer 1 HP Printer Desktop Computer
Konica Laser Printer 2 Desktop Computer
HP Scanner 3 Desktop Computer
Canon Printer - 1st Floor 4 PRINTER3849 Printer Canon Canon - PIXMA iP3000 F
Canon Printer - 2nd Floor 5 PRINTER2233 Printer Canon Canon - PIXMA iP3000 F
Canon Printer - 3rd Floor 6 PRINTER8297 Printer Canon Canon - PIXMA iP4000 F
Canon Printer - 4th Floor 7 PRINTER4205 Printer Canon Canon - PIXMA iP4000 F
HP Printer - 1st Floor 8 PRINTER7242 Printer Hewlett Packard Hewlett Packard - HP La
HP Printer - 2nd Floor 9 PRINTER6303 Printer Art Vandalay Hewlett Packard Hewlett Packard - HP La
HP Desktop Receptionist 10 DESKTOP7996 Copier Hewlett Packard Hewlett Packard - HP Pa
HP Desktop Secretary I 11 DESKTOP8231 Copier Hewlett Packard Hewlett Packard - HP Pa
Sony Desktop JN 12 AS8292 Copier Sony Sony - Sony VAIO VGC-
Sony Desktop MP 13 AS6362 Copier Sony Sony - Sony VAIO VGC-
Sony Desktop PN 14 AS7248 Copier Sony Sony - Sony VAIO VGC-
Sony Desktop RO 15 AS1036 Copier Sony Sony - Sony VAIO VGC-
Sony Notebook AB 16 AA7360 Fax Machine Sony Sony - Sony VAIO VGN-
Sony Notebook GB 17 AA5637 Fax Machine Sony Sony - Sony VAIO VGN-
Sony Notebook MB 18 AA1372 Fax Machine Sony Sony - Sony VAIO VGN-
Sony Notebook SC 19 AA6744 Fax Machine Sony Sony - Sony VAIO VGN-
Sony Notebook CS 20 BS3840 Fax Machine Sony Sony - Sony VAIO VGN-
Sony Notebook GR 21 BS8487 Fax Machine Sony Sony - Sony VAIO VGN-
Sony Notebook KR 22 BS3360 Fax Machine Sony Sony - Sony VAIO VGN-
Toshiba Notebook Sales 1 23 NOTEBOOK7567 Fax Machine Toshiba Toshiba - Toshiba Satell
Untitled
Page 1 of 1
76 items total
Show 100 per page
Refresh
Asset Type HP Printer
Type: Desktop Computer
Tag HP Printer
Part Number
Requester
Manufacturer
Company
Model
Location
Date Purchased 1/15/1921 10:19:12 PM
Preview
Issues
Assets
Dashboard
Knowledge Base
Network Maps
(14) All Open Issues
(9) Tech Support Queue
(0) Closed Issue Notification

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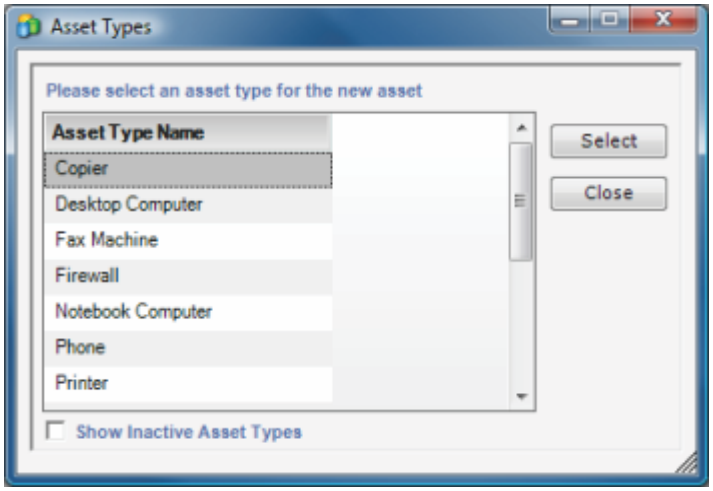
Creating a New Asset

The process for creating a new asset is quite a bit different than creating a new issue.

1. Click the

button. This will open the Asset Types window, displaying all known asset types.



2. Select the asset type for the new asset and click the **Select** button. This will open the Asset – Add window, shown below.

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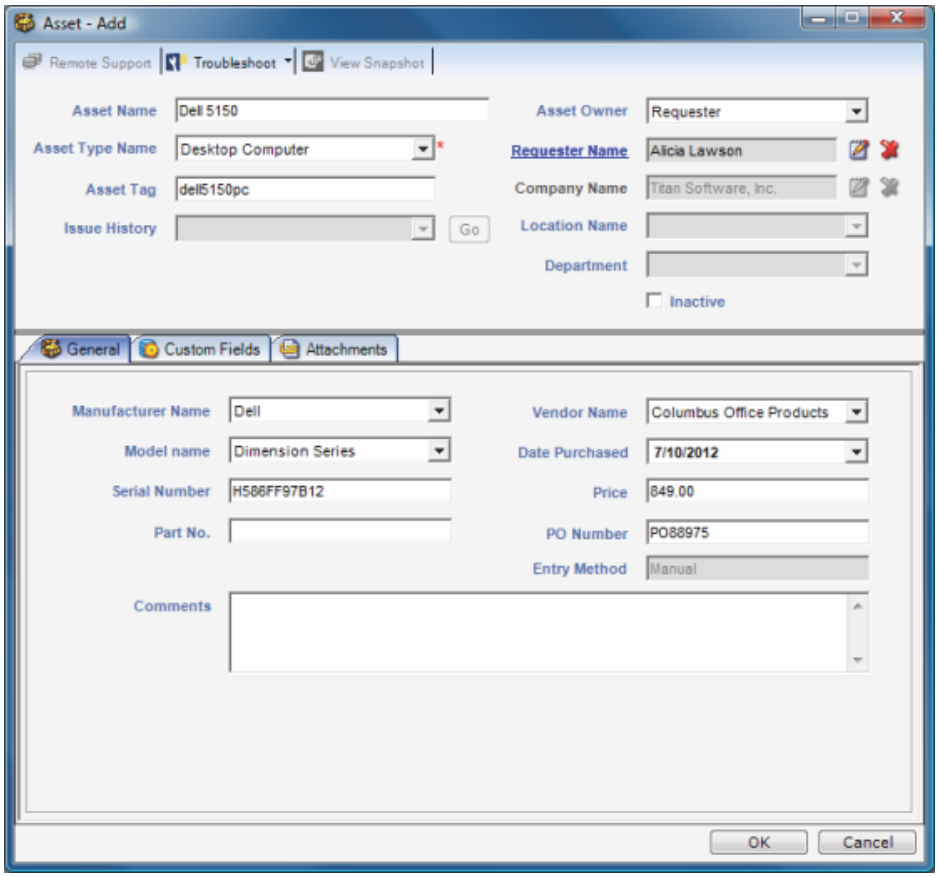

3. Enter the name of the asset in the **Asset Name** field.
4. The **Asset Type** field will already be completed from the prior step. This field is required.
5. Enter any asset tag information in the **Asset Tag** field.
6. If this is a new issue, you can ignore the **Issue History** field.
7. From the drop-down menu, select the **Asset Owner**. This will usually be requester or company.
8. Click the **Requester Name** field label. This is a link that will open the Requester window. Select a requester from the list of possible requesters.
9. Once a requester name has been chosen, the **Company Name**, **Location Name** and **Department** fields will be automatically populated if they are populated within the requester information.

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Tabs in the Asset – Add Window

The bottom pane of the Issue window consists of three tabs as shown below. Each tab will be explained in detail.

The General Tab

1. Select the manufacturer name from the **Manufacturer Name** drop-down menu.
2. Select the model type from the **Model** drop-down menu
3. Enter the serial number in the **Serial Number** field.
4. Enter the part number in the **Part No** field if applicable.
5. Select the vendor name from the **Vendor Name** drop-down menu.
6. In the **Date Purchased** field, select the date from the calendar drop-down.
7. Enter the price in the **Price** field.
8. Enter the purchase order number in the **PO Number** field.
9. The **Entry Method** field will be completed automatically and cannot be edited.
10. Enter any comments you would like to make in the **Comments** text box.

The Custom Fields Tab

If there are any custom fields in the issue, they will appear here in the Custom Fields tab. Complete any custom fields that are necessary.

The Attachments Tab

Use the Attachments tab to include any attachments necessary in the asset.

1. To attach a file, click the **Attach File** button, browse to the correct file in the Open window and click the Open button. The file will now be attached to the issue.
2. To attach an Item or items on the clipboard, click the **Attach Clipboard** button. The file(s) from the clipboard will now be attached to the issue.
3. To attach a URL, click the Attach URL button. This will open the **Attach URL** window. Enter the Web Address (URL) in the **Web Address** field, then enter a description in the **Description** field (both fields are required). Click the **OK** button when finished. Note that you must include “http://” with the URL.
4. To open an attachment, right-click on the attachment and select the application you would like to use to open the file, or select the attachment and click the **Open With** button, then select the application of your choice.
5. To delete an attachment, select the attachment and click the **Delete** button, then click **OK** at the prompt.
6. Click the **OK** button when finished, or select another tab to enter more information.

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Editing an Asset

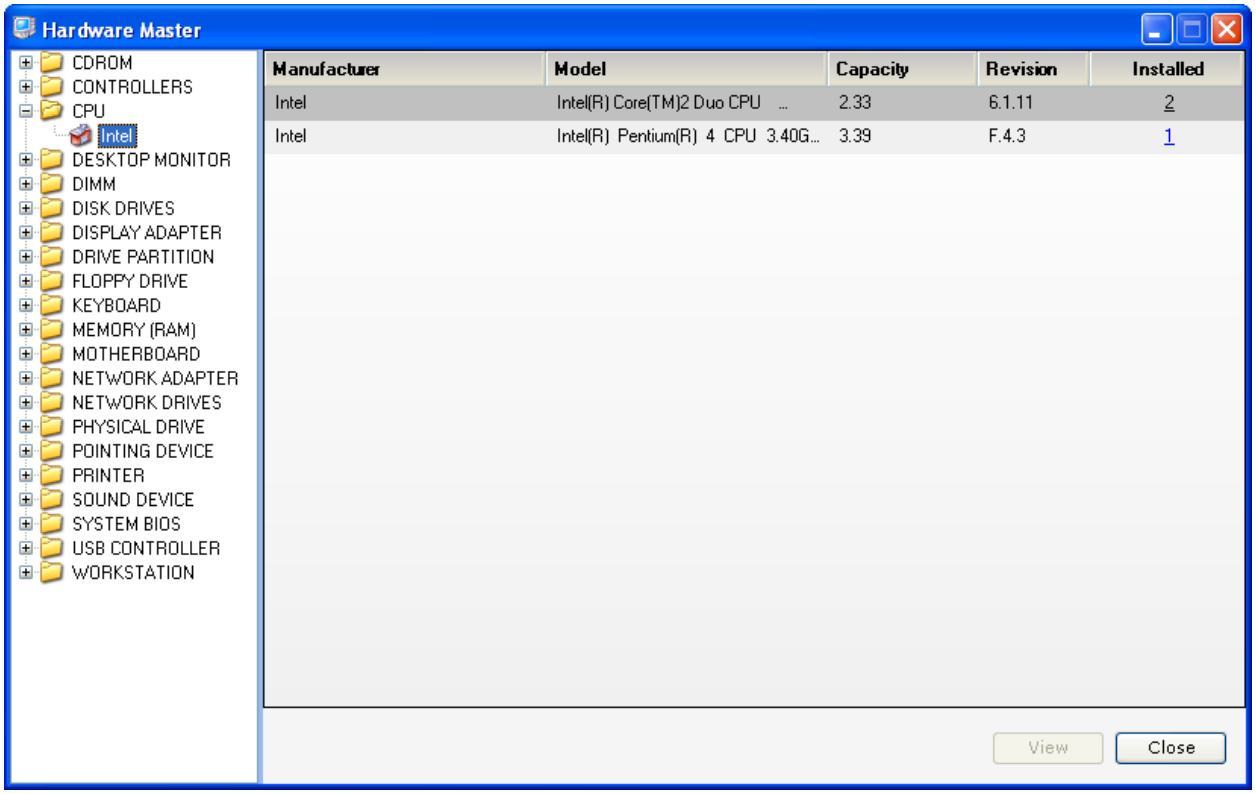
In your daily support activities you will most likely open and update existing assets.

1. Open the asset.
2. If anything has changed in the top portion of the issue, make those changes.
3. You will often be adding notes or attachments to assets. Use the General and Attachments tabs to add these if necessary.
4. Click the **OK** button when finished.

Hardware Master

The Hardware Master window is accessed from the HDAsset menu. The Hardware Master provides a comprehensive list of hardware components installed and/or configured on all audited computers. The Hardware Master window is composed of a navigation pane to the left and an interactive display panel on the right.

The table in the right panel of the Hardware Master window displays the Manufacturer, Model, Capacity, Revision and number of computers in which the selected hardware is installed.



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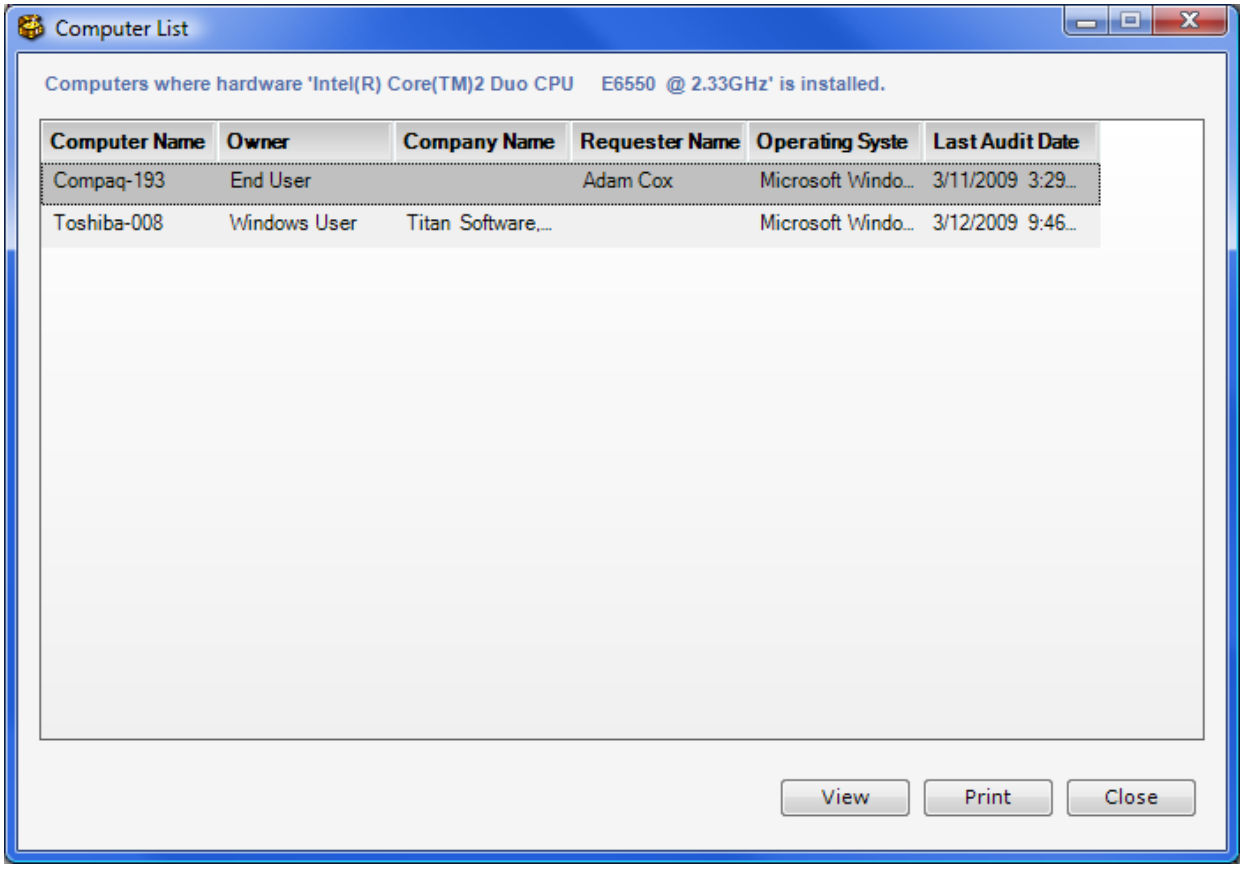
To display a list of the computers in which a hardware item is installed, click the number link in the “Installed’ column of the Hardware Master table for the selected component. The Computer List window will open as shown in the graphic below.



To view the details of the component installed in a particular computer, select the computer of interest and click the **View** button in the Computer List window. The Asset – Edit window for the computer will open. Select the Hardware tab and the component to display the computer specific info.

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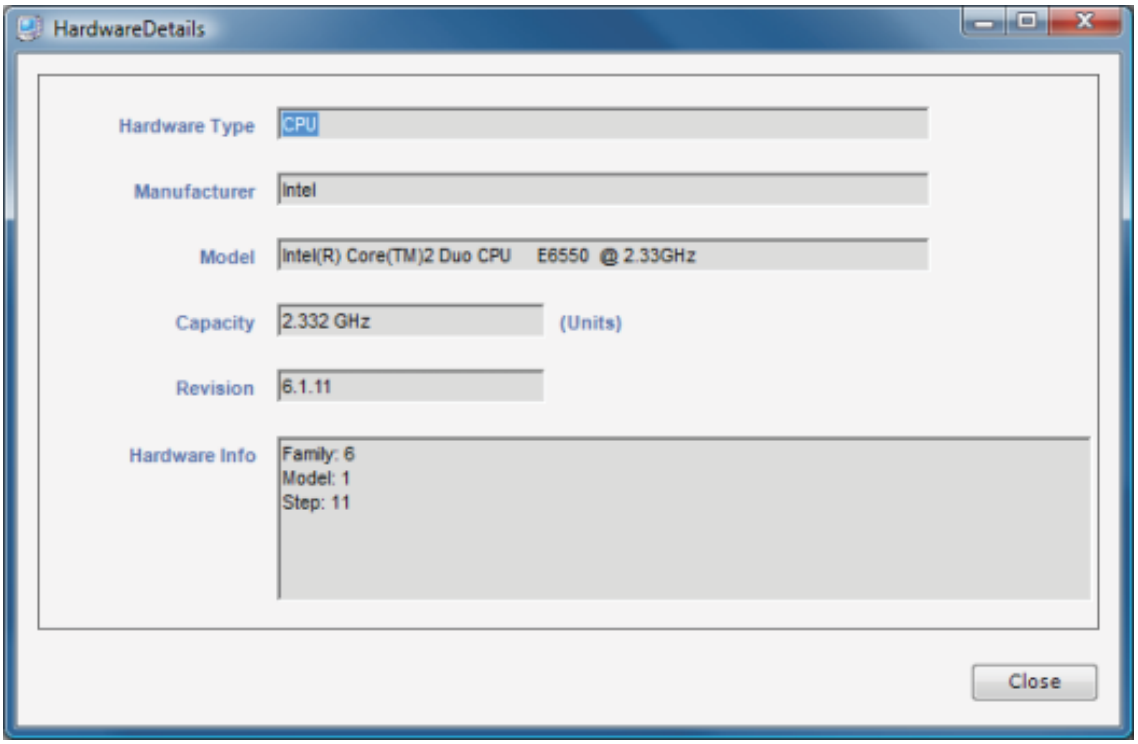
The hardware details can also be displayed directly from the Hardware Master table by double clicking a component or selecting the component and clicking the **View** button. A Hardware Details window will open to display the hardware details.



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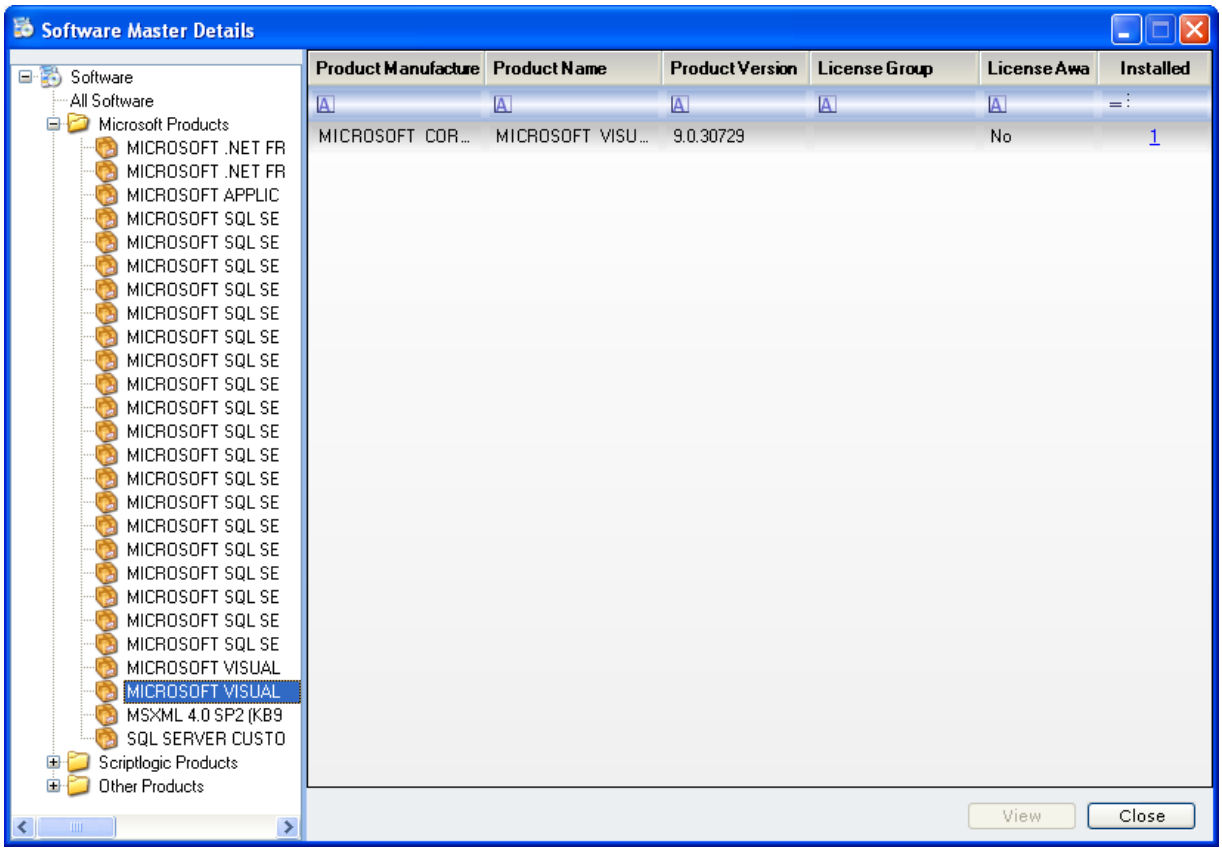
Software Master

The Software Master window is accessed from the HDAsset menu. Software Master allows you to track all software applications installed on the audited computers in your enterprise. It also enables you to manage licenses.

The Software Master details window is divided into two panels; the software category tree and the software master Product table. The Product table displays essential information regarding each individual software package including product details, license and installation information.



Adding, Updating and Deleting a Category

You can create a custom category tree by adding and deleting categories, sub-categories and license groups.

To add a category to the root or a sub-category to a category:

1. Right-click on the root or category and select **Add Category**.
2. A new folder will appear with a blinking cursor inside the name field. Enter the name of the category and hit **Enter**.
3. To edit a category name, right-click the category and select **Update Category Name** then follow Step 2 above.
4. To delete a category, right-click on the category and select **Delete Category**.

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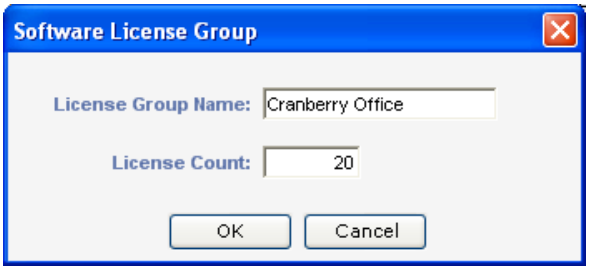
Adding, Updating and Deleting a License Group

You may find it a useful practice to create license groups to software categories in order to better manage your licenses.

To add a license group to a category:

1. Right-click the category name.
2. Select **Add License Group**. This will open the Software License Group window.



3. Enter the name for the new license group in the **License Group Name:** field.
4. Enter the license count in the **License Count:** field.
5. Click the **OK** button.
6. To update the name of the group or the license count, right click the group and select **Update License Group**. Update the group information and click the **OK** button.
7. To delete a license group, right-click the name of the group and select **Delete License Group**.

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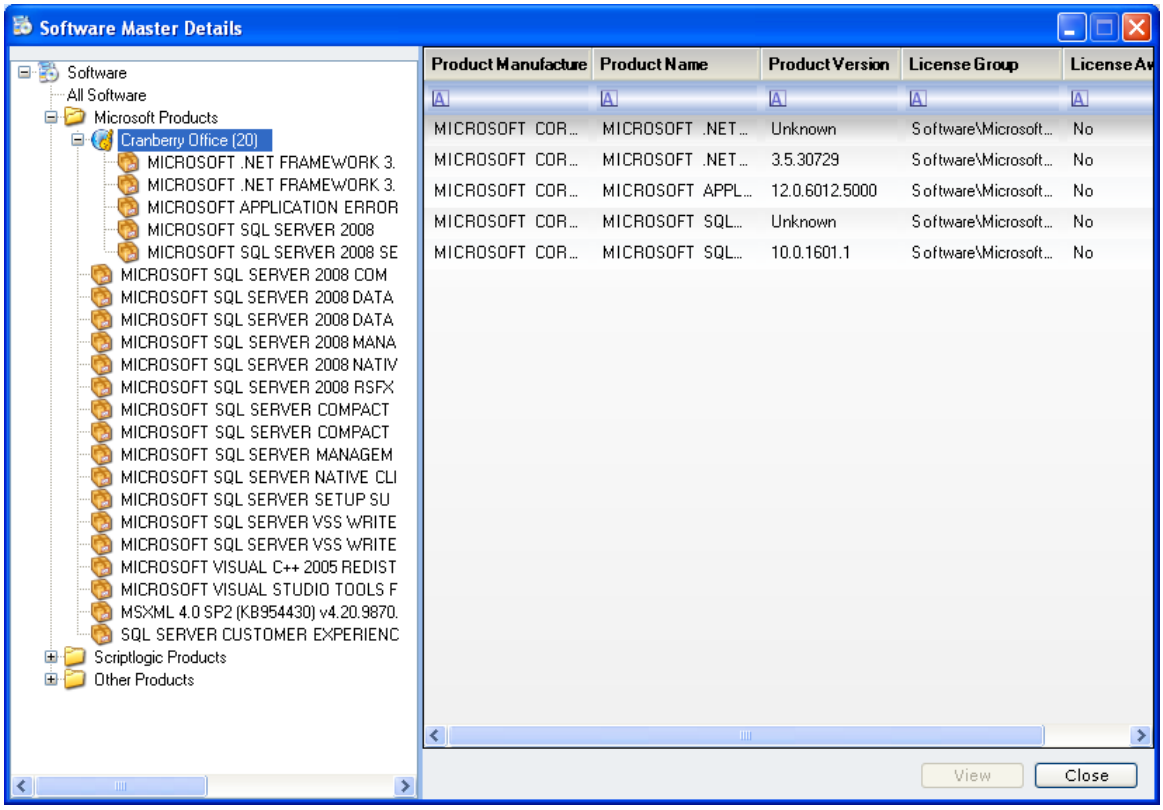
Assigning and Un-assigning Applications to a License Group

To assign a software application to a license group, select and drag individual applications to the group. Note that you cannot drag more than one at a time.


Software Master Details
Software
All Software
Microsoft Products
Cranberry Office (20)
MICROSOFT .NET FRAMEWORK 3.
MICROSOFT .NET FRAMEWORK 3.
MICROSOFT APPLICATION ERROR
MICROSOFT SQL SERVER 2008
MICROSOFT SQL SERVER 2008 SE
MICROSOFT SQL SERVER 2008 COM
MICROSOFT SQL SERVER 2008 DATA
MICROSOFT SQL SERVER 2008 DATA
MICROSOFT SQL SERVER 2008 MANA
MICROSOFT SQL SERVER 2008 NATIV
MICROSOFT SQL SERVER 2008 RSFX
MICROSOFT SQL SERVER COMPACT
MICROSOFT SQL SERVER COMPACT
MICROSOFT SQL SERVER MANAGEM
MICROSOFT SQL SERVER NATIVE CLI
MICROSOFT SQL SERVER SETUP SU
MICROSOFT SQL SERVER VSS WRITE
MICROSOFT SQL SERVER VSS WRITE
MICROSOFT VISUAL C++ 2005 REDIST
MICROSOFT VISUAL STUDIO TOOLS F
MSXML 4.0 SP2 (KB954430) v4.20.9870.
SQL SERVER CUSTOMER EXPERIENC
Scriptlogic Products
Other Products
Product Manufacture
Product Name
Product Version
License Group
License Av
MICROSOFT COR... MICROSOFT .NET... Unknown Software\Microsoft... No
MICROSOFT COR... MICROSOFT .NET... 3.5.30729 Software\Microsoft... No
MICROSOFT COR... MICROSOFT APPL... 12.0.6012.5000 Software\Microsoft... No
MICROSOFT COR... MICROSOFT SQL... Unknown Software\Microsoft... No
MICROSOFT COR... MICROSOFT SQL... 10.0.1601.1 Software\Microsoft... No
View
Close

Note that you can also select a category and drag software applications from the Product table to a license group. Using this option, you can select more than one application by selecting an item, then holding down the **Shift** key and selecting another item. All items between the two selected items will now be selected, and the entire group can be dragged and dropped into a license group.

To un-assign an application from a license group, right-click on the group and select **Un-assign Application** as shown below.

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Software Master Product Table

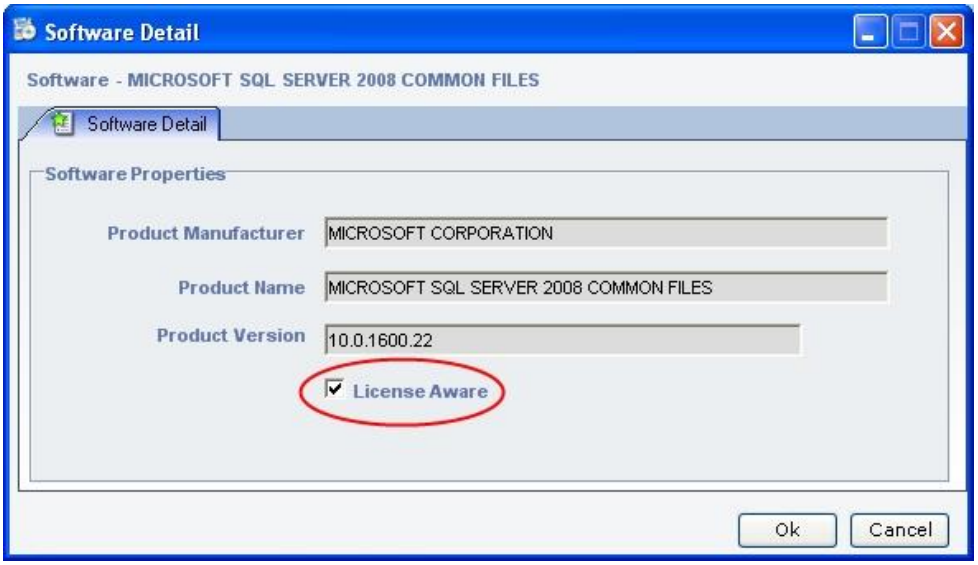
The Software Master Product Table displays the basic product and licensing information for each product application of the selected category, license group or software package. If you select a category that contains sub-categories, all of the software packages in the selected category and all of its sub-categories are displayed.

The License Awareness Column

The License Awareness column is important in tracking the total number of computers licensed to use a particular software package. HDAsset maintains this count by summing the number of License Awareness instances set to Yes.

To modify the value of the License Awareness value for given software package:

1. Double click the name of a software application in the Product table. This will open the Software Detail window.
2. Check the **License Aware** check box.
3. Click the **OK** button.



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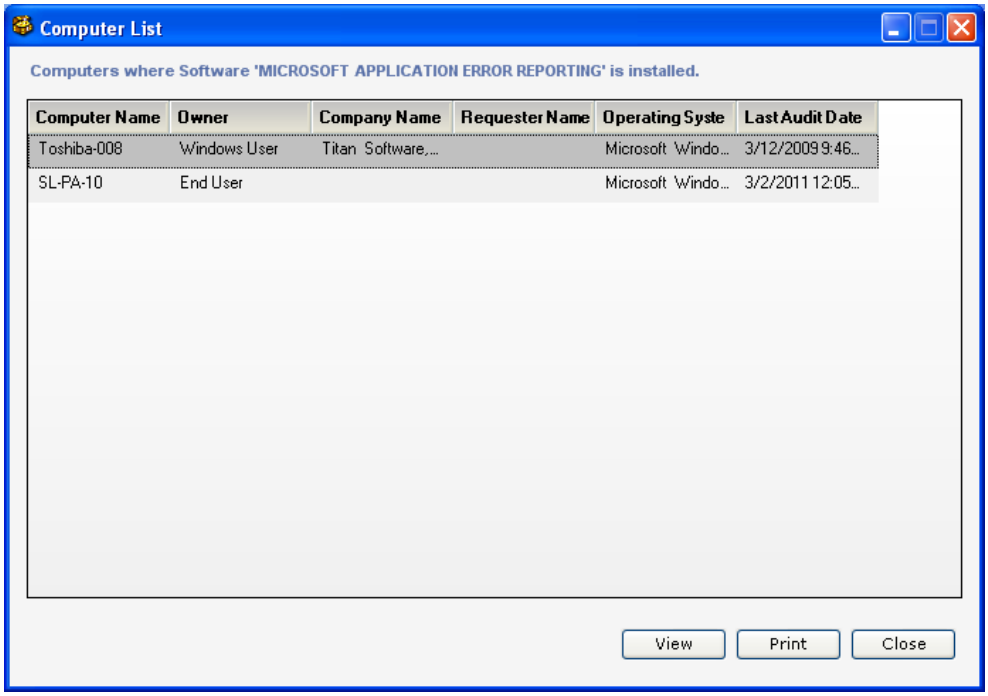
The Installed Column

The entries in the Installed column are links. Click the number value in this column to open the Computer List window. Double click on a computer in the list or select the computer and click the **View** button to open the Asset Edit window for the computer.



Double-click a computer asset in the Computer list to open the Asset – Edit window for that particular asset.

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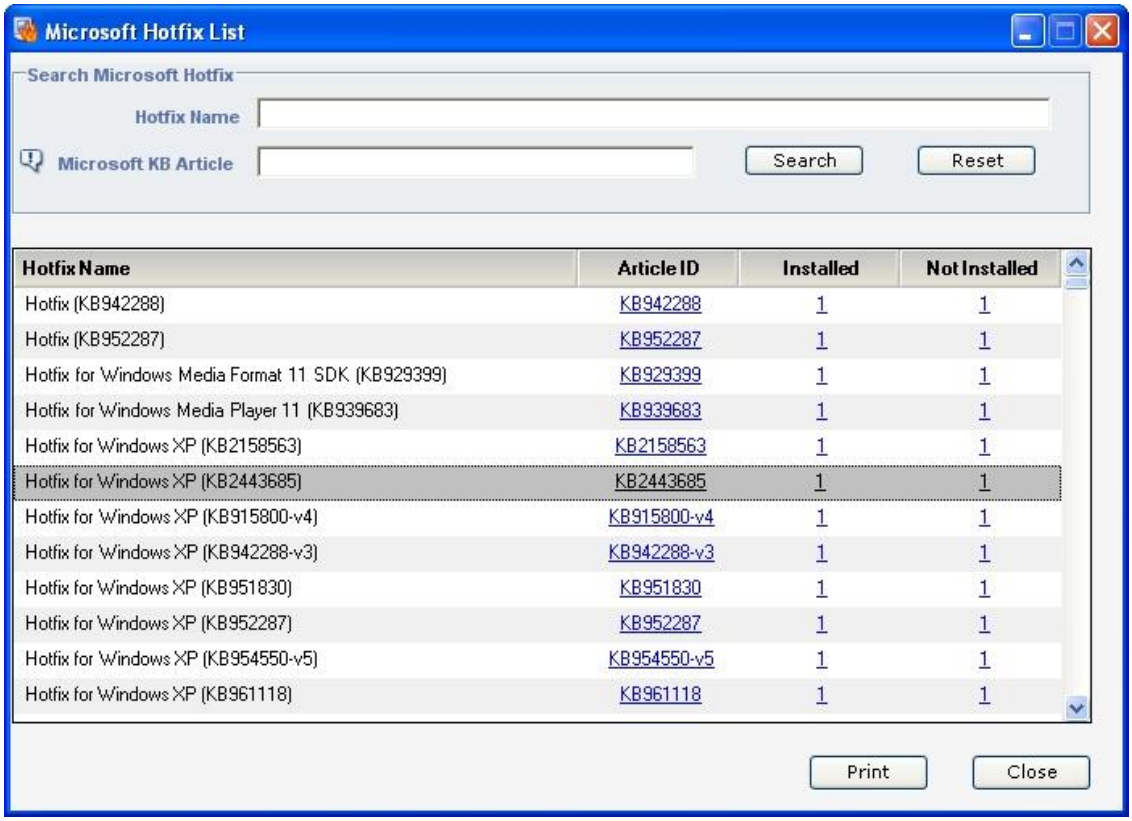
Microsoft Hotfix

The Microsoft Hotfix list displays a list of all the Microsoft updates that have been applied to the audited computers on your network. This list, as shown below, includes the Hotfix Name, the Microsoft Knowledge Base article ID, and both the number of network computers where the hotfix has been installed and the number where it has NOT been installed. Above the list of hotfixes are search fields that can be used to narrow the list of hotfixes displayed in the table. The example below shows the default Hotfix list display.


Microsoft Hotfix List
Search Microsoft Hotfix
Hotfix Name
Microsoft KB Article
Search
Reset
Hotfix Name
Article ID
Installed
Not Installed
Hotfix (KB942288) KB942288 1 1
Hotfix (KB952287) KB952287 1 1
Hotfix for Windows Media Format 11 SDK (KB929399) KB929399 1 1
Hotfix for Windows Media Player 11 (KB939683) KB939683 1 1
Hotfix for Windows XP (KB2158563) KB2158563 1 1
Hotfix for Windows XP (KB2443685) KB2443685 1 1
Hotfix for Windows XP (KB915800-v4) KB915800-v4 1 1
Hotfix for Windows XP (KB942288-v3) KB942288-v3 1 1
Hotfix for Windows XP (KB951830) KB951830 1 1
Hotfix for Windows XP (KB952287) KB952287 1 1
Hotfix for Windows XP (KB954550-v5) KB954550-v5 1 1
Hotfix for Windows XP (KB961118) KB961118 1 1
Print
Close

The text in the article ID, Installed, and Not Installed columns are hyperlinks. Click on an entry in one of these columns to display the linked information. The numbers in the Installed / Not Installed columns represent numbers of computers. Clicking on one of these numbers will open the Computer list window that will display a list of computers where a particular hotfix has or has not been installed.

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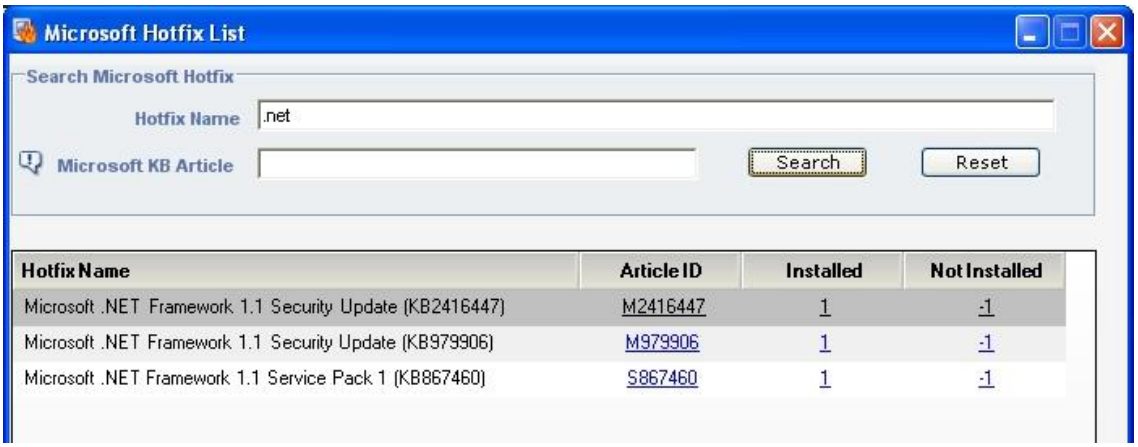
Clicking on a designator in the Article ID column will launch a web browser to display the relevant Microsoft Knowledge Base article from Microsoft's Help and Support website. In the example below, we have selected article ID "KB2158563", and the corresponding article has opened from the Microsoft website.

Upgrade your Internet experience
Microsoft Support
Search Microsoft
Support Home
Solution Centers
Advanced Search
Buy Products
Tweet
1
Like
Article ID: 2158563 - Last Review: September 27, 2010 - Revision: 2.0
September 2010 cumulative time zone update for Windows operating systems
View products that this article applies to.
On This Page
Expand all | Collapse all
Important This update supersedes and replaces update 981793, which was released
2010. This update also includes additional time zone changes that were signed in to l
update 981793 was created.
If you have already deployed update 981793, read the descriptions of the specific tin
changes that are addressed in this article to determine whether you must deploy this
immediately. If systems are not directly affected, you can schedule deployment at th

To narrow the list of hotfixes displayed, use the search fields in the top pane of the Microsoft Hotfix list window. The two fields available for the search are **Hotfix Name** and **Microsoft KB article**. When searching using the **Hotfix Name** field, any portion of the name can be entered as a search term. For example, searching on ".NET" will return any hotfix with .NET as part of the Hotfix Name.



In a similar way, entering a Knowledge Base article ID, or part of one, will return that particular Knowledge Base article or articles, displayed in a results grid similar to that shown in the example above.

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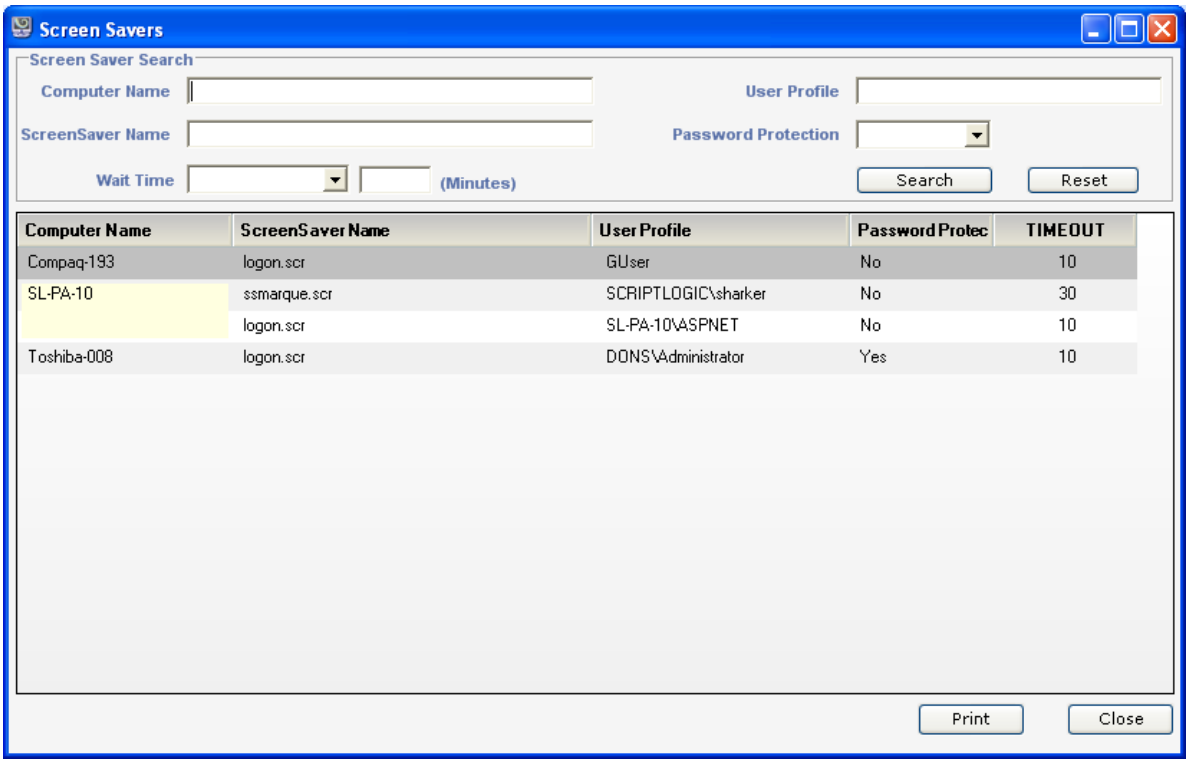
Click the **Reset** button to reset the Hotfix Name and Microsoft KB article text boxes. This will also reset the Hotfix list to the default (showing all hotfixes).

Screen Savers

The Screen Savers window lists the screen saver settings for each person who has logged onto the audited computer. This window displays the screen saver name, user profile, password and timeout for these screen savers.

The top panel of this window is the Screen Saver Search panel. It allows you to search through the list of screen savers by the contents of any combination of columns to find entries that contain the search criteria. Enter the search criteria and click the **Search** button to execute the search.

Click the **Reset** button to clear entered search terms and restore the default listing.



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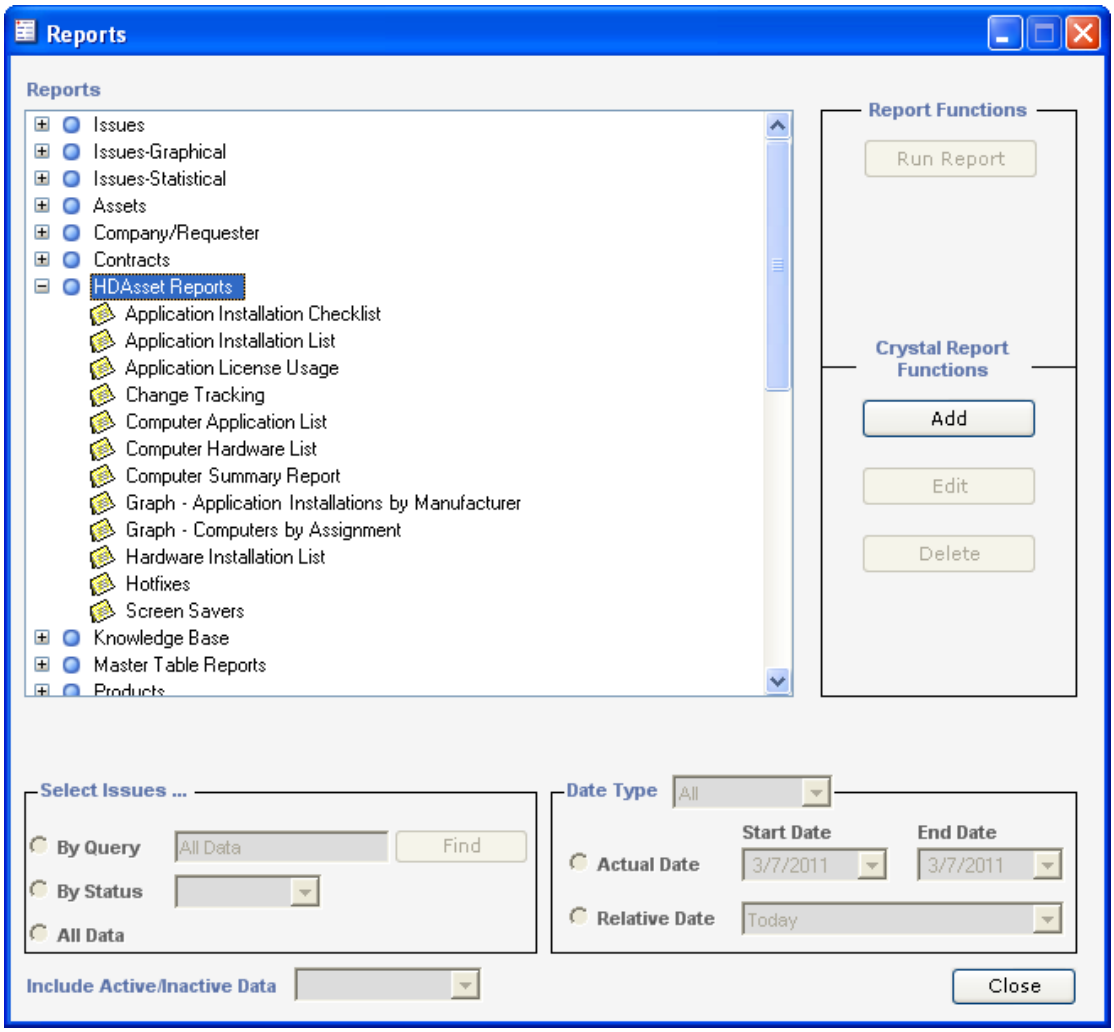
Reports

Quest supplies a HDAsset library of standard reports to assist you in inventory management. Each report has been written to help you monitor the software and hardware currently installed on each computer in you network as well as what software or hardware should be installed on each of your computers but is not.

Functionality has also been included to allow you to use the standard report writing software, Crystal Reports, to create custom reports. However, the Help Desk Authority filtering features (query, status and date filters) are not available for use with reports that are custom designed with Crystal Reports. For more information, see the Help Desk Authority User's Manual.

Select the **Reports** icon from the Toolbar to launch the Help Desk Authority Reports window. In this window, predefined public and private reports can be run and report categories can be created.



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The standard HDAsset reports are available in the **HDAsset Reports** category of the **Public** folder in the **Reports** directory tree. The standard HDAsset reports as of this writing are described in the following table. Additional standard HDAsset reports may be added as necessary.

Report	Description
Application Installation Checklist	Creates a list of all the software products contained in the selected categories that are not contained in computers included in the report.
Application Installation List	This report displays a list of all applications installed in your network computers and the computers each application is installed in.
Application License Usage	This report displays the number of licenses issued and the total number of licenses for each software package by category.
Change Tracking	Change Tracking displays the changes found for each audited computer between the specified beginning audit and the specified ending audit.
Computer Application List	This report lists all applications found in each audited computer.
Computer Hardware List	Computer Hardware list is a list of all the hardware installed in each audited computer.
Computer Summary Report	This report lists the general, hardware, software and network information discovered during the last audit of each computer.
Graph – Application Installations by Manufacturer	This graphic report displays the percentage of all applications installed as a function of manufacturer.
Graph – Computers by Assignment	This graphic report creates a graph of Number of Computers vs. Tracking Field selected, where Tracking Field is Customer, Company, Department, Location or Domain.
Hardware Installation List	Hardware Installation is a list of all installed computer hardware found in the network and the computers the hardware is installed in.
Hotfixes	Hotfixes lists which Microsoft Hotfixes selected have been installed on which specified computers.
Screen Savers	Screen Savers displays a list of screen savers by user for each computer.

Running a Standard HDAccess Report

To run a standard HDAsset report:

1. Expand the **HDAsset Reports** category and select the required report.
2. Click the **Run Report** button.

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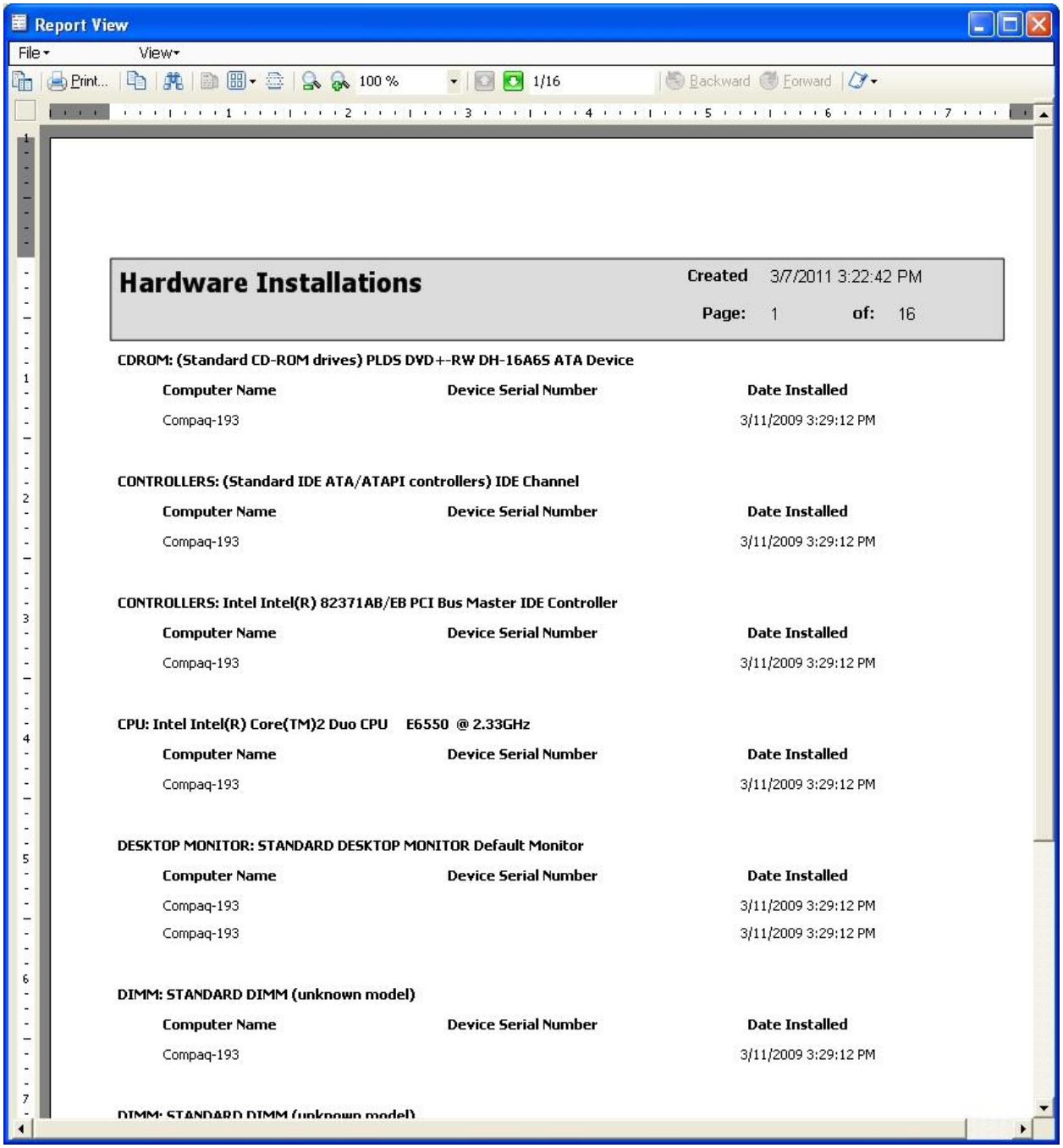
A Typical Report

Hardware Installation list is a typical HDAsset report. The hardware installed on your audited computers is listed with the name of the computers on which the hardware is installed, the serial numbers of the device and the date the hardware was installed. The following graphic displays page 1 of this report.



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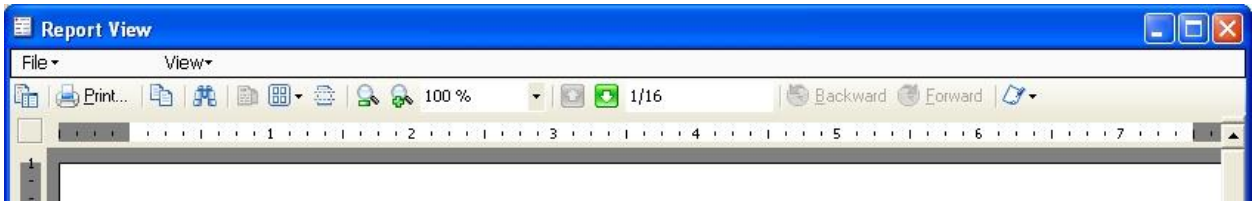
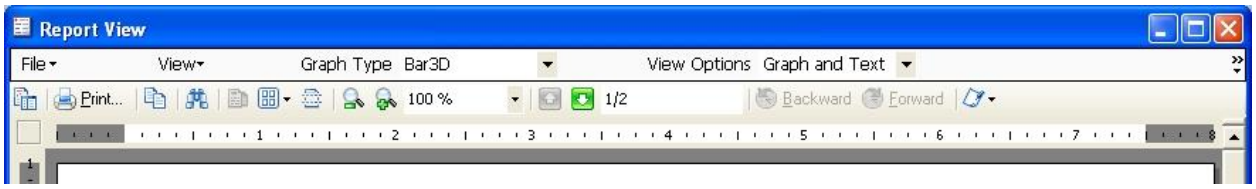
The Report View Toolbar



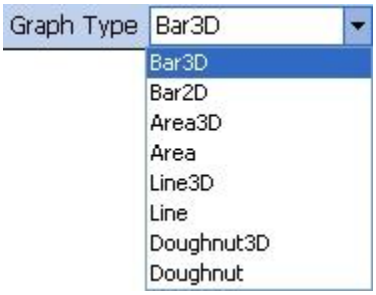
The Report View toolbar above displays at the top of HDAsset reports generated in Help Desk Authority. This Toolbar contains standard icons for viewing/displaying the report output, printing, or searching for information in a report. Hover your mouse over the icons and a tool tip will identify unfamiliar icons.

Graphic Reports Options



Graphic reports generally display as a 3D bar graph followed by a data table which displays the data used to create the graph. The following options are added to the Report View menu bar for graphics reports.

Graph Type



Graph Type allows you to change the graphic from the default Bar 3D to any of those shown in the Graph Type drop-down list. The new report will be created when you select the type of graph you need.

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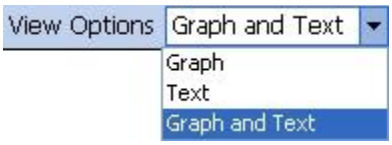
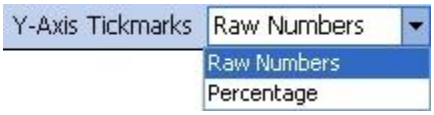
View Options



The **Graph** option will create a report with only the graph. Likewise the **Text** option will only have the table containing the data used to create the graph. **Graph and Text** is the default setting.

Y-Axis Tickmarks



Y-Axis Tickmarks gives you option of using the raw data or percentage for the Y-Axis.

Using HDAsset Computer Queries in Reports

A number of standard HDAsset reports detail the distribution of software or hardware for each computer included in the report. Typically, the default setting is to include all computers when creating these reports. If you are interested viewing data from a smaller subset of your network computers, you can do so by using an HDAsset query to select the computers to be included in the report.

If computer queries are allowed for the selected report, the "**Select Issues ...**" frame at the bottom of the Reports window will change to "**Select Computers...**", and the radio buttons in the frame will be enabled.

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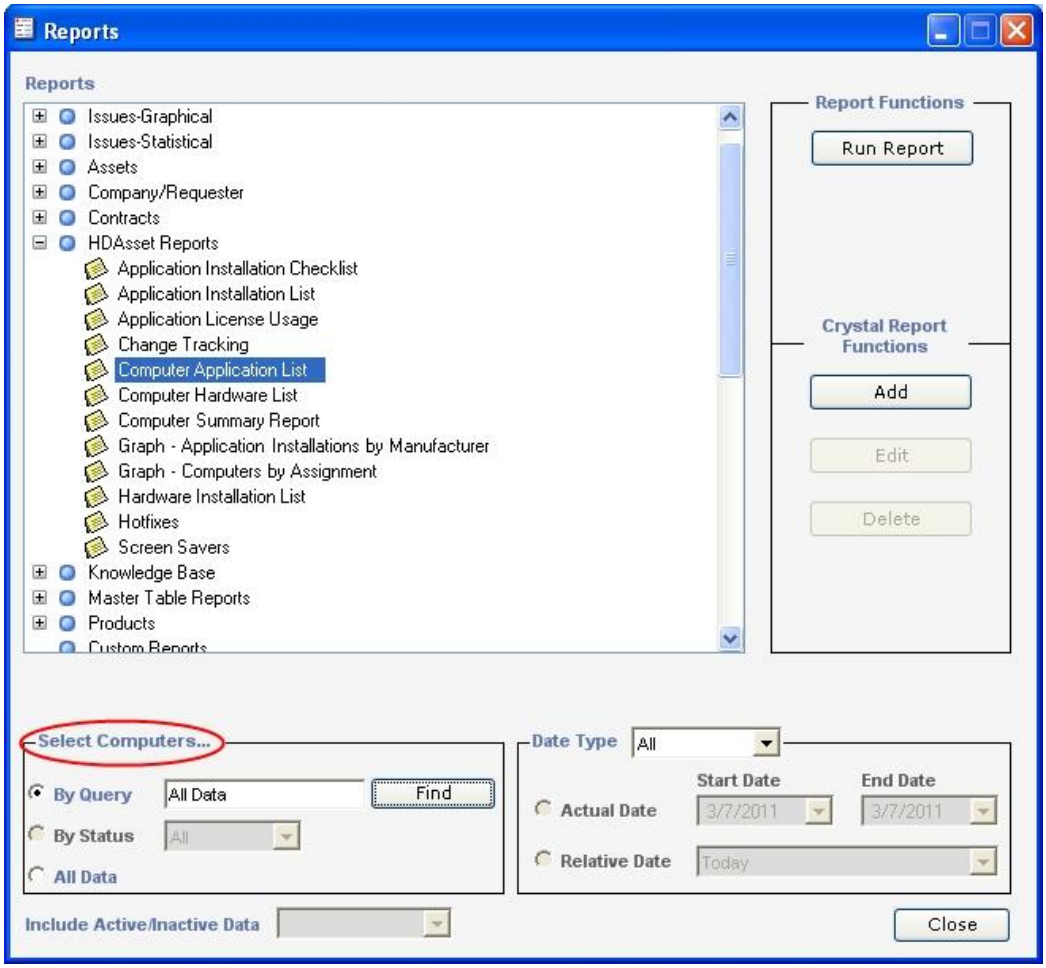

To select computers by query:

1. Select the **By Query** radio button.
2. Click the **Find** button. This will open the query Manager window.
3. Select the query.
4. Click the **Select** button;
5. Click the **Run Report** button

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As an example, suppose the head of the documentation team wants each of his team members to have the following applications installed on their computers:

- Microsoft Word
- Adobe Professional
- HyperSnap
- Adobe Photoshop
- RoboHelp

One solution is as follows:

1. Create a software category called “Documentation” in the Software Master Details window and assign each of the required applications to the Documentation category.
2. Create a custom asset field called “**asset_Department**” that will be required for all assets.
3. Enter “Documentation” in the **asset_Department** field for each of the documentation computers.
4. Create a query to find all computers with an asset_Department value of “Documentation”.
5. Run the Computer Application Installation report and use this query to check and see if each of the computers have the required applications installed.

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Chapter 11 – Foglight NMS Integration

Quest's Foglight NMS is a network management and application tool that allows you to:

- Monitor the performance of routers, hubs, switches, servers, and applications in real-time
- Capture traffic data for any device on your network
- Monitor the health of VMware® ESX servers and monitor the health of guest Virtual Machines
- Provide advanced email and SMS alerts for devices, including servers, switches, hubs, routers, and other network infrastructure gear
- Monitor the health of your VoIP system

The integration of Foglight NMS with Help Desk Authority allows you to synchronize the Foglight NMS device database with your Help Desk Authority asset database.

Quest Foglight NMS continuously monitors network hardware resources and their metrics. When Foglight NMS detects a problem with a device, it creates a device alert which in turn creates a new issue ticket related to the device or asset in Help Desk Authority.

HDAutoEscalate can be configured to look for tickets created for any particular type of asset, including Foglight NMS asset types. Customized notifications are then used to notify all stakeholders of the problem.

When the ticket is resolved in Help Desk Authority the Foglight NMS device alert that triggered the ticket is reset.

If an asset is deleted from Help Desk Authority the corresponding device will be deleted from the Foglight NMS database also.

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Viewing Foglight NMS Information

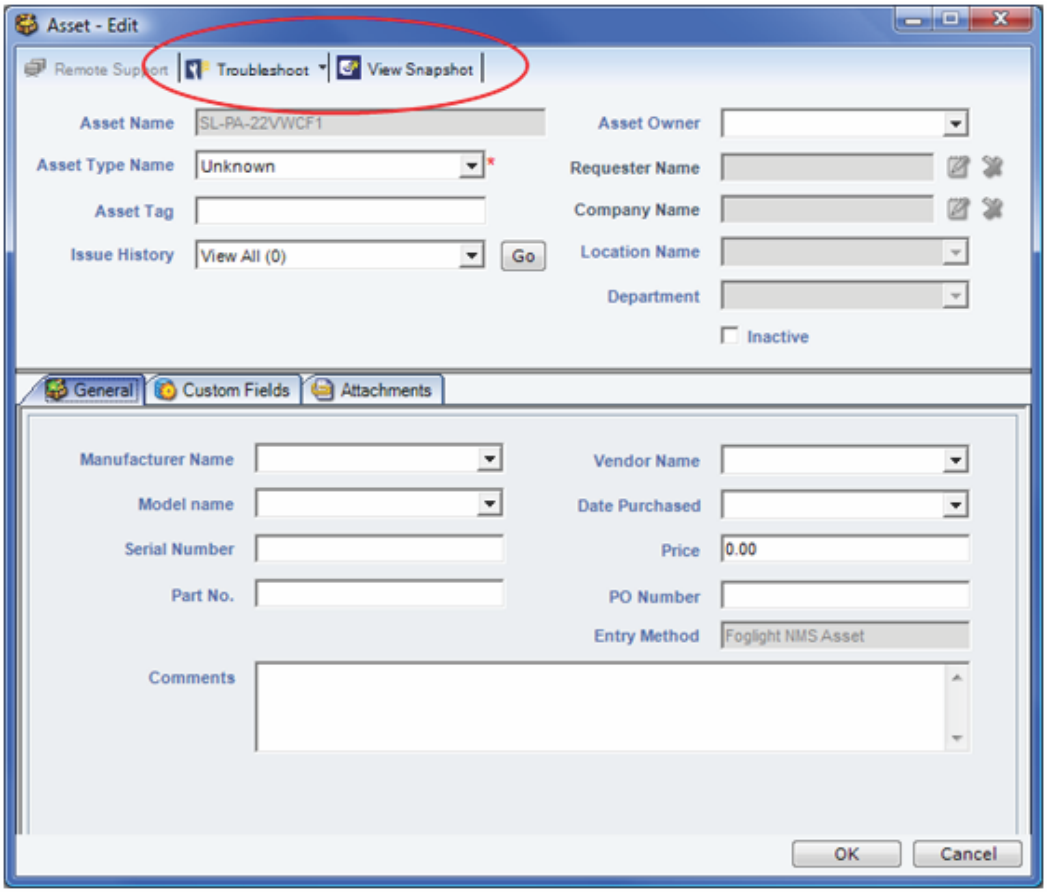
You can view the Foglight NMS data for a particular asset through the **Asset Edit** screen for the asset or for an asset associated with a particular issue through the **Issue** screen.

In the Asset Edit Screen

To view the Foglight NMS data for a particular asset in the **Asset Edit** screen:

- Open the Asset Edit window for the asset. Click the Asset Icon, enter the asset name and click the **OK** button OR select the asset type of the asset and search for the asset – see the note "Filtering Foglight NMS assets below.)
- Click the View Snapshot button to open the Foglight NMS page for this asset.

Note: Filtering Foglight NMS Assets
A device in Foglight NMS becomes an asset in Help Desk Authority. Each device/asset is assigned an asset type during synchronization. If you do not know the asset name of the asset/device, use "Asset Type" in the Asset screen to display the list of assets with the requested asset type.



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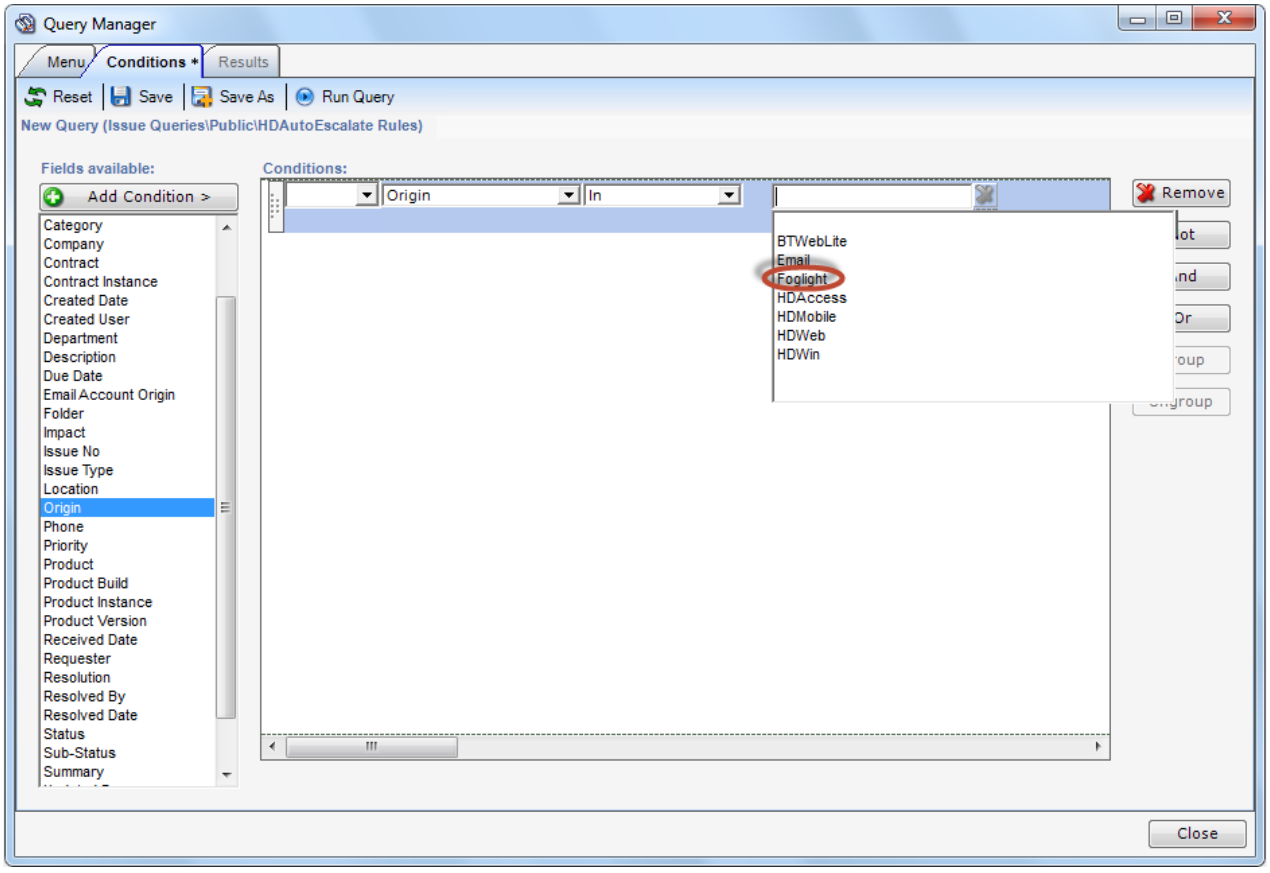
To view the Foglight NMS data for an asset associated with a particular issue from within the issue:

- Open the Issue Edit window by clicking the Issue icon, entering the issue number and clicking the **OK** button OR use a query to generate a list of all Foglight NMS issues from which you can select the issue you are interested in (see the "Locate all Foglight NMS Issues" note below).
- Click on the View Snapshot button on the Asset tab

To locate all Foglight NMS Issues:

To help find Issues created by Foglight NMS you should create a query that uses the **Origin** field to find and display all Foglight NMS Issues. To create this query:

1. Open the Query Manager (click the **Query Manager** icon in the toolbar), select a folder and category to save the query in and click the **Add Query** button. This will open the Conditions tab.
2. Select Origin in the **Fields available** list.
3. Click the **Add Condition** button, then select "Equals" or "In" from the second drop-down list.
4. Select "Foglight" from the third drop-down list**.**



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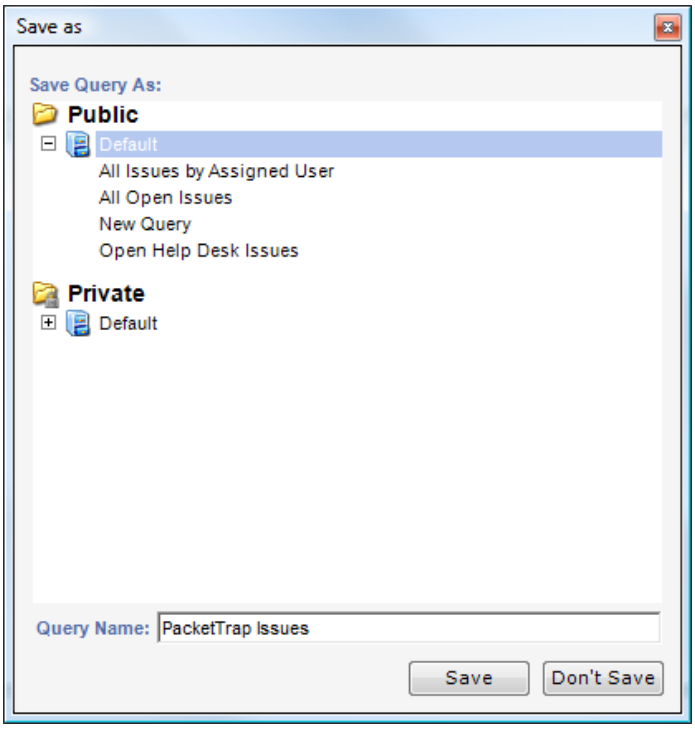
5. Click the **Save As** button.
6. Enter the query name in the **Query Name** field and click the **Save** button again.



To run the query, select query from the Toolbar, expand the folder and category you created the query in, select the query, then click the **Run Query** button in the toolbar.

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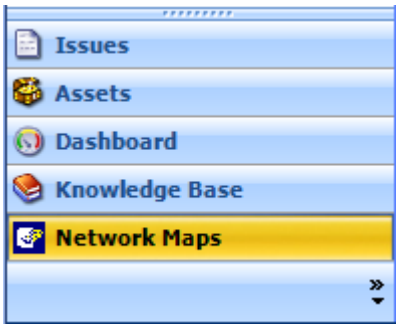
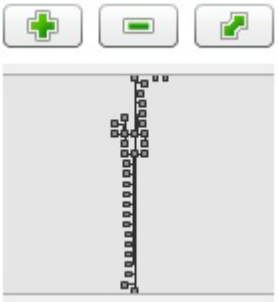
Viewing the Network Maps

To view the network maps generated by Foglight NMS, click the **Network Maps** button in the navigation pane as shown below.



This will display the list of Network maps for each location or organization from Foglight NMS. Select the map you would like to view.

Use the "**+**" or "**-**" buttons to adjust the map view. The map will be presented in the selected view.



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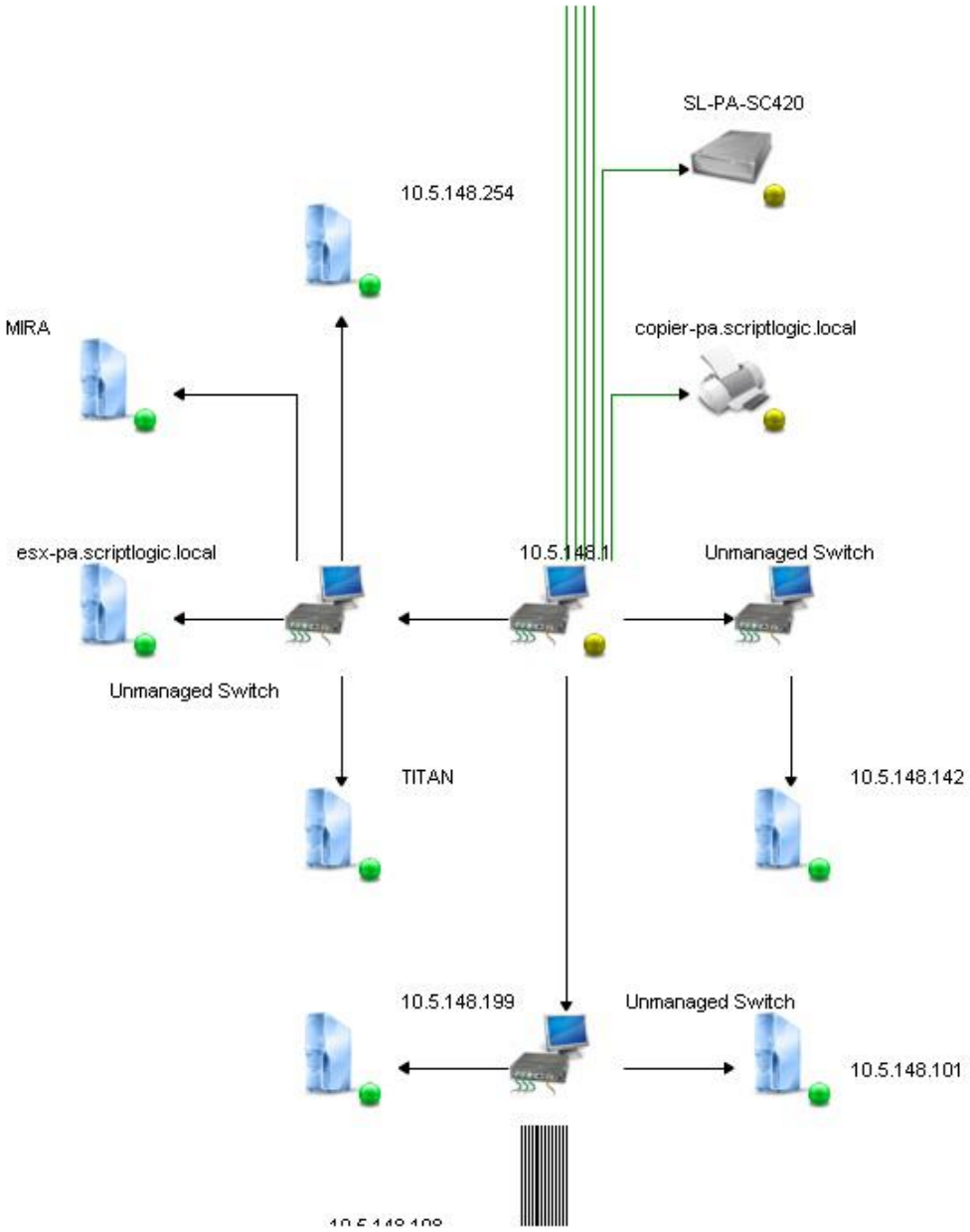

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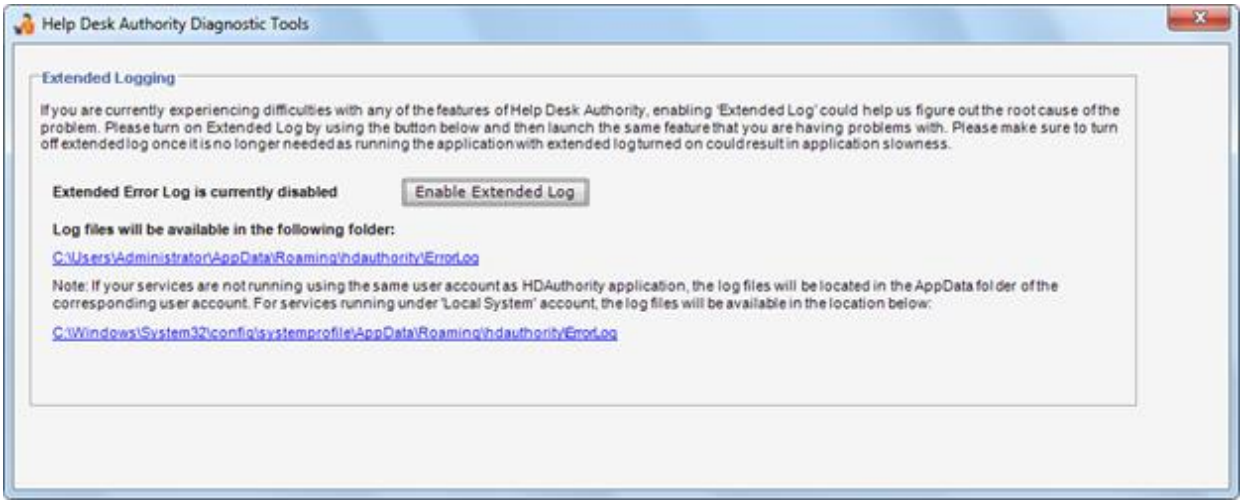
Chapter 12 – Troubleshooting Help Desk Authority

Help Desk Authority has the ability to enable extended error logging, which will help users identify the cause of unexpected problems or errors. Once extended error logging is enabled, HDA will write detailed error logs regarding each feature.

Because extended error logging usually decreases the performance of the application, it is disabled by default. Users can enable this feature on a single machine as needed.

In order to turn on extended error logging for HDA components, select **Help** > **Diagnostic Tools** from the main menu.

This will open the Help Desk Authority Diagnostic Tools window as shown below.


Help Desk Authority Diagnostic Tools
Extended Logging
If you are currently experiencing difficulties with any of the features of Help Desk Authority, enabling 'Extended Log' could help us figure out the root cause of the problem. Please turn on Extended Log by using the button below and then launch the same feature that you are having problems with. Please make sure to turn off extended log once it is no longer needed as running the application with extended log turned on could result in application slowness.
Extended Error Log is currently disabled
Enable Extended Log
Log files will be available in the following folder:
C:\Users\Administrator\AppData\Roaming\hdauthority\ErrorLog
Note: If your services are not running using the same user account as HDAuthority application, the log files will be located in the AppData folder of the corresponding user account. For services running under 'Local System' account, the log files will be available in the location below:
C:\Windows\System32\config\systemprofile\AppData\Roaming\hdauthority\ErrorLog

To troubleshoot any issues with Help Desk Authority:

1. Click the **Enable Extended Log** button to turn on error logging.
2. Launch the feature that you are having problems with and use it as you would normally.
3. *Open the error log location (shown in the Diagnostic Tools window above) where you will find log files that contain information that can help us find out the root cause of the problem.

*For desktop application/windows services, error log files will be located under the user's roaming profiles under their AppData folder (as shown in the screen above).

Note: for web applications, additional error messages are written in the event viewer's Application Log.

Although these error log files are primarily designed for interpretation by our customer support technicians and developers, users may read the contents to perhaps resolve the problem before contacting support. The cause of some problems may be self-explanatory and may be resolved without a call to the Help Desk. If you have no success in interpreting the contents of the error log, you may contact the HDA Help Desk and provide the details of the error log.

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Note: In some cases, the AppData folder is not visible by default. You may need to change the View Options (Show Hidden Files) to make this folder visible.

When extended error logging has been enabled, the button will change from **Enable Extended Log** to **Disable Extended Log**. Once you no longer need extended logging, remember to turn it off, because it can cause the application to run slowly.

When extended logging is enabled, the title bar of Help Desk Authority will be appended with the text "[Extended Error Log Mode]," and a pop-up reminder will display in the notification area when you log on.

The Help Desk Authority Diagnostic Tools window is also available from the HDServer Modules with a list of all of the HDA services installed, their statuses, the option to start or stop services, and a link to the Windows Services Console. For more information, see the HDServer Modules manual.

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